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ABSTRACT

The guide presents six papers designed to help people become effective advocates for gifted and talented children. In "Effective Advocacy: Understanding the Process and Avoiding the Pitfalls," P. Mitchell considers such obstacles as using an adversarial rather than a persuasive approach and being impatient. She charts a procedure for more systematic advocacy beginning with needs assessment, planning, contact, and finally evaluation and followup. T. Kraver ("Parent Power: Starting and Building a Parent Organization") presents practical guidelines for parents on such topics as creating public awareness and recruiting members. Experiences in North Carolina are reflected on by L. Aubrecht in "Organizing for Advocacy: Making It Work on the State and Local Level." In "Knowing What You Want and Getting It," R. Siewert reviews the state legislative and rulemaking processes with notes from Oregon's experiences. P. O'Connell ("Advocating for Long-Lasting Change") reviews rules of behavior change and puts forth seven principles for success in advocacy, including injunctions to listen, study other successful advocacy efforts, and define the solution. In the final paper, W. Apker considers "The Challenges Ahead for Gifted and Talented Education" on federal, state, and local levels. (CL)

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An Advocate's Guide to

Building Support for Gifted and Talented Education

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An Advocate's Guide to Building Support for Gifted and Talented Education

Patricia Bruce Mitchell
Editor

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Introduction

You would like to be an effective advocate for gifted and talented children because you feel they are not getting the kinds of educational opportunities they need or deserve. You are interested in these special children because you have seen their frustration and boredom at home or at school with lessons that are not challenging.

Schools must try to help these children, you contend, because our nation needs their ideas and talents. Or maybe you feel that every child, including the more able, has a right to an education appropriate to his or her needs. Or perhaps part of your desire to change education's response to the gifted stems from your own memories of what it was like to grow up with a brighter mind or a special talent.

So you are committed to changing education for the gifted and talented, to getting more support for better programs. You are no longer just a concerned person: you are ready to take action, to be an advocate.

This is for you, to help you move from being a silent supporter of gifted and talented children to becoming an effective spokesperson. The purpose of the articles that follow is not to convince you to speak up. All of the authors assume you have realized that if you do not step forward and help convince others to support the gifted and talented, then probably no one else will. You are not the type to wait around and hope that state and local officials will provide for gifted and talented children on their own initiative.

Obviously you have the potential to be, or are already, an initiator, a "go-getter." Use this book as a friendly advisor as you move forward in advocacy for the gifted. We the authors share your concern that our schools are continuing to neglect or inadequately attend to the unique needs of gifted and talented children. We have all been involved in successful, and some not-so-successful, efforts to change federal, state and local response to education for our ablest students. What we have learned in our encounters as advocates we freely share.

The articles that follow will explain the essential elements for effective advocacy:

- Knowing the pitfalls of advocacy for the gifted and talented and how to avoid them
- Understanding the overall process of how to work within the governmental and educational systems to get what you want
- Organizing people to get the numbers and energy needed to get support
- Learning the structure and operating procedures of the various state agencies that decide what educational programs will get funding and how those programs will be operated
- Seeing programs for the gifted and talented as being part of all of education, and learning how to build the programs so that they can be accepted by the rest of the system, now and in the future

My article, which follows this introduction, will focus on the first two elements —knowing the pitfalls and understanding the process—but you can expect to find helpful information on what *not* to do as an advocate throughout the monograph. We all have made some mistakes at one point or another, so we are very anxious to point out ways that you can avoid them.

The articles by Ted Kraver and Lyn Aubrecht will help guide your efforts to organize your fellow supporters for gifted and talented educational programs. Ted is a co-director of a nationwide network of advocates and has helped establish state and local groups concerned with gifted and talented children. Lyn also has considerable state and local level experience with organizing.

Bob Siewert's article should help explain the state agencies so that you feel more comfortable with advocacy efforts at that level. Bob has directed programs for gifted and talented within the Oregon Department of Education for several years, and has helped preserve those programs despite some severe fiscal problems. Lyn Aubrecht also has some very useful ideas to contribute on advocacy at the state level, particularly with a state legislature.

Patty O'Connell helps put all the specifics explained in the previous articles into perspective by talking about advocacy as a way of creating change. Her article outlines some of the firm principles behavioral scientists have learned about changing people and organizations. Because Patty has helped many local districts build programs for gifted and talented students, she can explain how to apply the principles of change to advocacy for programs for gifted and talented children.

Wes Apker's article concludes this book by helping us all to look to the future so that we as advocates can build programs that will be stable for years to come. Because Wes has played an important leadership postion in education at the local, state and national level, his visions of future challenges and his ideas on how to adapt our advocacy approaches to meet those challenges will be useful.

Read. Contemplate. Emulate, or even reject the suggestions contained herein. But, please, do make a commitment to invest at least some of your time and abilities to making our schools and communities more supportive of programs that will develop the potential of our nation's gifted children.

Patricia Bruce Mitchell
Editor

Effective Advocacy: Understanding the Process and Avoiding the Pitfalls

Patricia Bruce Mitchell

As you become an advocate for improved programs for gifted and talented children you will find yourself drawing on skills from a variety of professions. For example:

- The calm, reassuring "bedside manner" of a physician will be helpful in soothing the many people who are afraid that programs for the gifted and talented will "hurt" their budgets, or their schools' democratic image, or the feelings of those children who are not placed in the program;
- The negotiating abilities of a diplomat will help in resolving the disagreements that are likely to occur among fellow advocates over the who-what-and-how issues of organizing and carrying out a push for better programs;
- The smooth persuasion of a used car salesperson or a trial attorney will be invaluable as you convince others to buy your idea and to deliver necessary funding and program support;
- The stamina and the cool-headedness required of a firefighter are vital. Many times it will be all you can do to hang in, and keep yourself and others fighting so the whole effort does not go up in smoke.

As with regular jobs, advocacy for the gifted and talented is not without its occupational hazards. The greatest risk to a person who advocates for gifted and talented children is the development of a "crusader complex" which is marked by a we-versus-them attitude and an overwhelming desire to march forward and "do battle" even when it is not appropriate.

More than three years ago, I came to my present position with a developing case of the crusader complex. My assignment was to work with decision makers, state boards of education, state legislatures, and state departments of education in six states to help them establish stronger state policies and programs to educate gifted and talented children. I went out armed with facts about gifted and talented children, a good working knowledge of what was currently being done for them across the nation, and some definite ideas about what needed to happen if gifted children were to have the educational opportunities they needed. I was sure there would be a lot of opposition. But I was wrong. Most people were neutral or mildly supportive of the idea of special programs for children with outstanding abilities. They just did not know enough about the subject. When I found a decision maker who was opposed to gifted and talented education it was usually because they once had a run-in with an overzealous advocate.

Since that first year, I have worked with decision makers and advocates in many more states and have slowly converted my own crusader attitude into a more realistic approach. I have also begun to see definite patterns in advocacy efforts for the gifted and talented. There seem to be some right and some wrong ways to channel all that creative, but frustrated, energy that advocates for the gifted and talented always have.

So this article is for sharing those perceived patterns with you. First, I will start with some of the wrong approaches, then move on to a suggested process for using your drive and abilities to achieve success as an advocate. Finally, I will briefly explore the possibilities of using litigation in advocacy for the gifted.

Pitfalls in Advocacy Efforts for Gifted and Talented Children

Pitfall #1: Using An Adversarial Rather Than A Pursuasive Approach

Perhaps part of the problem advocates have with being advocates is the term itself. "Advocate" originates from the Latin word for legal counselor. It means one who pleads in favor of, supports by argument, defends or vindicates. Even common usage of the term is closely associated with legal proceedings.

Another part of the problem is the lack of appropriate models for advocates of the gifted and talented. There is a natural tendency for us to model after the advocates for the rights of minorities and the rights of the handicapped. They were successful, so we feel that if we do the same thing we will also reap big rewards for the children we represent. Unfortunately this line of reasoning will not work. Those "other advocates" were very adept in various pressure tactics. But these tactics will not work as well for advocates of the gifted for three reasons:

- **The "cause" is different.** The basic rights of the handicapped and children from minority background were violated when they were systematically segregated from others. This inequity created a basis for guilt among those responsible for the segregation. Guilt makes us more responsive to pressure tactics. Unfortunately, few people feel very guilty about not doing something extra for children who have outstanding abilities. Nor can you contend that gifted and talented children are being denied access to an education. Even though they may be bored and unhappy, they are still in school.
- **Times have changed.** Everyone has learned to be more assertive as pressure tactics have become a part of everyday interactions. Thus pressure no longer provides the high visibility for a cause that it once did.
- **We are wiser.** We have learned a lot from the 60's and 70's. Legal proceedings can take years to complete. Even when the cause has been won, or a mandate incorporated into law, it will be a long time before state and local systems can implement the letter, much less the spirit, of the ruling. We are finally realizing that change is not an event; it is an evolutionary process.

In summary, "winning through intimidation" may work beautifully with hotel clerks who lose confirmed reservations, but it frequently backfires when trying to apply it to decision makers. The better approach would be to model yourself after a good salesperson. It may not be as inspiring as the "march into battle" adversarial approach, but it is more likely to be effective.

Pitfall #2: Assuming That People In Administrative And Political Positions Are Not Too Bright Or Not Very Knowledgeable—Or Both

It is amazing to see advocates in action who are displaying obvious contempt for the legislators, board members, or administrators with whom they are dealing. Perhaps this occurs because of a disrespect for "politicians," or because the advocates feel that their superior knowledge of the subject at hand puts them in a superior position. Such attitudes and actions are destructive to any cause. They are particularly deadly if the advocate is speaking on behalf of the gifted. Even the words "gifted", "talented", or "exceptionally able" evoke fear of elitism. This topic should not be presented by *any* advocate with even a supposedly concealed attitude of dislike for decision makers.

The problem with advocates and their disrespect for decision makers probably stems from a lack of understanding and contact with them. The vast majority of decision makers are exceptionally competent and capable people. They have good intentions and they honestly try to improve education for all children. They are extremely busy people and they simply do not have the time to learn about all of the topics we advocates expect them to know. People in state legislatures or on school boards are generally not educators, so they have the additional burden of having to learn quickly many of the things educators have learned over several years.

Advocates seldom realize that these decision makers have to grapple with issues that we do not understand. State finance systems for education; setting priorities for limited budgets; taxpayers support for education; equity for minorities and for the handicapped; and the problems of working with a variety of federal, state and local agencies who have responsibilities in education are just a few of these "larger" issues. Despite our own feelings on the matter, gifted and talented programs will probably always be a minor issue.

Pitfall #3: Being Impatient

It is very tough to be patient when you see children whose abilities need attention and development *right now*. But patience in advocacy for the gifted and talented is more than a virtue, it is a requirement.

Advocate outbursts are extremely counterproductive. They can lead to the exclusion of that advocate or all other advocates for that particular cause from further discussions and hearings. If the outburst occurs during a one-to-one meeting or a telephone conversation, the advocate may never have the opportunity to talk with that decision maker again.

I once saw a leader of a state education organization lose his temper during a question and answer session with a state board of education. He heatedly asked when the Board was going to do something about a problem, that he was tired of all the delays. The Board answered him, but when he left, the Chairperson of the Board turned to the Vice-chairperson and said, "That person will not be allowed to appear before the Board again." The right to free speech or the "sunshine laws" cannot *make* decision makers listen to you. They can control their agenda and the number of people allowed to speak on an issue. An advocate who has been insulting in the past can be prevented from speaking again by the group exercising their right to limit the time allowed for public participation.

Pitfall #4: Being Human

The failure of many advocacy efforts for the gifted and talented (or for any other cause for that matter) can be directly or indirectly traced to a common human malady—egoism. For example, a current (or former) member of an organization does not feel they have been given adequate input into or control over an advocacy effort such as getting legislation through, or seeking school board approval for a program. So they quietly (or not so quietly) work to undermine the group's actions. Or, the members of one organization for the gifted and talented are miffed when they learn that another organization is pushing for some proposal that would improve programs for the gifted and talented without consulting them. So they refuse to give their support, or, worse yet, work to damage the credibility of the other group's proposal. These and similar scenarios have occurred throughout the country.

Perhaps the toughest challenge you will face as an advocate for the gifted and talented will not be to testify before a legislative committee, but to manage to get a group of fellow advocates to work together. Advocates cannot play the role of a single knight jousting in a tournament while the rest of the group are on the sides "cheering" with occasional letters or phone calls to decision makers. You must be willing to share the spotlight with your colleagues, and even to stand aside so that some key legislator, administrator or board member can take the credit for your success.

If you cannot fully commit yourself to cooperative advocacy, perhaps you should look for another way to help gifted and talented children. Decision makers are less responsive to lone voices of complaint. It will take a chorus of committed persons to get the support needed for top-quality programs for every gifted and talented child. Getting that chorus together will require a lot of effort and selflessness so that no one voice rises above the others.

Channeling Your Energies in the Right Direction Through Systematic Advocacy

Now that you have thought about what not to do, let us look at a process that can make your efforts more systematic and more successful. The process consists of four basic phases:

1. **Needs Assessment**—Determining what support you currently have, what support you will need and what they will "buy";
2. **Planning**—Mapping out what you want to happen; how you will present your request; and how you will get the votes needed for approval;
3. **Contact**—Presenting your request to the decision makers whose approval is essential;
4. **Followup and Evaluation**—Doing a "post-mortem" on your efforts to determine what to do and what not to do next time. This phase usually merges into the needs assessment of the next advocacy effort, so the process is a continuous cycle.

It takes a lot of stamina to give your best energy and ideas to all four phases. The temptation is to focus on the contact, with some quick planning just before, but with little or no needs assessment or followup. Resist the temptation. It is essential to spend time to carry out the needed activities in all four phases.

Phase One: Needs Assessment

Needs assessment is a fashionable term in education circles, but the needs assessment you are about to do is not one of those "act-like-you-are-concerned-about-perceived-and-actual-needs" exercises which are all too commonly labeled a "needs assessment." You will, of course, conduct some of the typical assessment activities by finding out what is currently going on for gifted and talented in your district, state and/or across the country. The discrepancy between the reality—"what is happening"—and the ideal—"what should be happening"—are your needs.

There is another part to this phase of the process that is not a typical type of needs assessment. In fact, it would be more accurate to call it a political assessment. Sound complex? It isn't really. It is simply finding out who is supportive, who is not supportive and who is undecided about improving programs for gifted and talented children.

Part One: What Is Going On? What Needs To Happen?

Some of the questions that may help you determine "what is going on" and "what needs to happen" are outlined below:

- On the local level
  - — How many and what types (elementary, secondary, inner-city, suburb, etc.) of schools have programs?
  - — How many children are served in the first three grades, the next three, middle school and high school?
  - — What types of abilities are served in gifted and talented programs (e.g., high intellectual, academic, artistic, leadership and/or creative thinking)?
  - — How many and what types of programs serve the gifted and talented (e.g., supplements to regular classes, part-time classes, resource rooms, full-time classes)?
  - — How much do the programs cost over and above normal per pupil costs, and what are the sources of those funds (federal, state, local or other)?
  - — Are there gifted and talented programs in your district or in your state that are especially well respected and serve as "lighthouses" to other schools?
  - — What training is available for administrative and instructional staff?
  - — How are the programs being evaluated?

— Where are the gaps? How many and what types of schools do not have gifted programs? Which grade levels are not receiving services? Which types of abilities are being ignored?
— In schools which have programs, what do the administrators, teachers, students and their parents think are the strengths and weaknesses of the programs?
— In schools which do not have programs, are efforts underway to develop programs? If not, what is discouraging them from providing special services to gifted and talented children?
— What do the schools feel they would like to do over the next three to five years to improve and expand programs?

- On the state level
  — What are the current statutory and regulatory policies which govern gifted and talented education in your state?
  — What is the current level of state appropriations earmarked for gifted and talented programs?
  — What services does the state department of education provide to local districts (e.g., consultant help, workshops, resource and reference materials, etc.)
  — Which state organizations and agencies offer training and technical assistance to local school personnel (e.g., institutions of higher education, intermediate/regional education units, teacher centers, professional organizations, etc.)?

During this part of the needs assessment you should also talk to several students, parents, teachers, administrators, as well as to community leaders to find out what needs to be done to improve programs for the gifted and talented. Get their ideas through informal discussions, as well as through surveys. The more formal "opinion polls" will be useful in making presentations to boards, administrators and legislators. The informal discussions will be invaluable in determining how to set up a program that will work within the system.

Since there may be a lot of information to collect during the needs assessment, your group probably should divide tasks. A committee can help set up individual assignments, and pull the reports back together for the larger group. Timetables should be set so that this part of the process does not take too long.

Part Two: What Support Do You Have? What Barriers Will You Face?

If you or any of your fellow advocates have been trying to build support for a new or expanded program for the gifted and talented, then you will already have some of the puzzle pieces needed for this political analysis part of the needs assessment. But do not decide that you already know all your supporters and barriers. You may have misread previous actions by decision makers as being signs of negativism when their actions were prompted by other events or factors, when they are, in fact, fairly supportive of gifted and talented programs. Also, a recent election, or a reshuffling in an administration can change the dynamics that created support or a barrier to previous advocacy efforts.

The process you should follow in sorting out the politics is outlined below:

- **Step One: Find Out Who You Will Need To Influence**

  As a group, decide who may be potential "targets" for your advocacy effort. Think of decision makers whose support you must have, such as your local school board, your local superintendent, the state board of education, the state legislature, the chief state school officer (superintendent/commissioner) and/or the Governor and staff. Then think about people whose support you may need if the decision makers are going to approve your request, such as principals, teachers, parents, central office/agency staff.

For the sake of clarity, you may want to think of the first group of people as "primary targets"—since they are the ones with the authority to approve your request. The others are "secondary targets": their support may be necessary to get approval from the primary targets.

Let's take an example. Say your group wants to focus on building senior high programs because the first part of your needs assessment, as well as your own experiences, show that this is the greatest area of need. The local superintendent and, in turn, the school board will have to support your proposal to expand programs into the higher grades. So the Superintendent and the Board are your primary targets. But common sense tells you that if you do not have the support of the secondary principals, and at least several teachers at the high schools, then your effort to convice the superintendent and board are doomed.

- **Step Two: Find The Leaders Within Your Primary Target Groups**

If you have decided you need the support of a state or local school board, or the state legislature, you will need to find out who are the most influential persons within those target groups. You can find this out by asking other persons who have worked with the group and know their leadership dynamics, and/or you can go and observe the groups yourself. I recommend doing as much observation as possible. It will give you a lot of invaluable information on individual members and how they work together, and will also make you feel more at home when you have to talk with them. Also, they will see your face at meetings and are likely to be more convinced of the sincerity of your concerns about gifted and talented children when you make your request.

In determining group leadership, look for those persons who seem to be most often listened to by their colleagues. Their questions and comments seem to be respected by the group. Their suggestions are most often discussed and followed. Beware! The most respected or persuasive voice may not be the one most often heard. Also, although the chairperson may be a respected leader, you are less likely to get him or her to be an outspoken supporter for your cause. Chairpersons frequently feel they must play a less visible role in supporting a given issue. Look for the other people who are held in high esteem by the group. If the chairperson turns out to be unwilling to be an outspoken supporter, you can turn to the other key group members for help.

- **Step Three: Find Out How Your Primary Targets Feel About Educational Programs For Gifted And Talented Children.**

Meet with the key leaders and the other primary targets individually to find out what they think about programs for gifted and talented children. This is not as simple as it sounds. Most advocates have a very difficult time finding out what people think about gifted and talented programs because they want to tell them what to think. Spend the brief time you will be given to meet with the decision makers by letting *them* do the talking.

This part of the process is the most difficult for the advocate to pull off. Here are some specific suggestions on what to do and say.

— Set up an appointment for about 15-30 minutes (important decision makers will probably not agree to see you unless you promise to take no more than 15 minutes) at the most convenient location for the decision maker. Tell them you want to get their ideas before drawing your organization's plans for advocacy activities. If you are to talk with a single board member (state or local) you will need to assure them that you realize that they cannot speak for the board, that you just want their own ideas on how to proceed.

— Go to the meeting alone, or with no more than one other person. Too many people present will discourage open discussion.

— Open the meeting by *briefly* introducing yourself, who you represent, and explain that your group is anxious to improve the school/district/state programs for gifted and talented students. Tell them that you have come to find out what they think should be the next directions for gifted and talented programs in the school/district/state and what they think is the best way for your group to get support from them and their fellow decision makers. Do *not* ask any question that may make them defensive such as, "What do you know about gifted and talented education?" or, "Why do you think the school/district/state has not done more for the gifted and talented?" or worse yet, "Do you have any gifted children or do you know someone who is gifted?"
— After that very brief introduction (no more than 2-3 minutes) stop talking and give them a chance to think about your question and respond. Expect a brief silence. If they appear uncertain about what to say, and the pause goes on too long, ask another brief question, or rephrase your first question. By asking another question you will demonstrate that you have, in fact, come to seek their opinion, not to drum up business for your cause. A second brief question might go something like this: "We know that the district has a number of innovative programs (flattery will loosen them up) for the gifted at the elementary level. But we feel that these programs should be expanded to include more children. How do you think we could help make that expansion happen?" Decision makers will almost always start talking after one or two questions, or they will at least start asking *you* questions. Try to give brief answers if they ask you questions, then get back to asking them the questions. It is very easy to be seduced into playing the role of the expert. Do not succumb to any attempts to get you to do all the talking.
— Take some notes while they are talking, especially on the important points. Notes will help you remember the discussion later. Also, note taking shows that you are really listening, and that you consider their ideas noteworthy. Put your pen down any time they seem uncomfortable, or if their tone or comments indicate they prefer to remain "off-the-record."
— If the decision maker expresses interest in the subject of gifted and talented education but does not know much about it, offer to come back with or send more information. If they show considerable concern for this subject, then it is appropriate to ask them if they are willing to support your group's efforts. If they agree to support you, then ask what you can do to help make it easier for them to get support from their fellow decision makers.
— Watch the time, and the decision maker's nonverbal signs of interest. Wrap up the interview before it becomes obvious that you have overstayed your welcome. Thank them, promise to follow up with any information they requested, and leave.

Let me stress again, do not use the interviews to start your active advocating for gifted and talented education. Pretend you are wearing an invisible muzzle. You want to get a good look at the way they think before you reveal too much of what you and your fellow advocates believe in. You also want them to have the chance to talk about how they feel about special attention for gifted and talented children. You will not be able to accomplish this if *you* do most of the talking.

- **Step Four: Pool The Information From The Interviews With The Target People, And Decide Who Are Likely To Be Your Supporters, Who May Not Support Or May Even Block Your Efforts, And Who Seems To Be Undecided.**

  Your group, or the committee conducting this phase of the needs assessment may wish to complete the form shown in Appendix A with the following cautions:

  — **If in doubt about a target person, list them as neutral.** Talk with them further, or ask others about the target's feelings about programs for gifted and talented children before making a decision about their supportiveness.

  — **Don't focus your time and energy on the non-supporters.** Many people are not as negative as you think. They just know too little to be supportive, or they have other priorities. If a person is *definitely* not in support of gifted and talented education, and their opposition presents a *major* problem to your effort, try to talk with them and pursuade them to remain neutral when the votes are cast, or when the proposal is presented to their colleagues. Do not try to convert them to being supportive, at least not for this round of effort. Focus instead on finding out which persons/agencies/organizations have the capability to counterbalance the barrier, then work on making these counterbalancers more supportive. When looking for counterbalancers, do not forget business and community leaders, particularly if the opposing decision maker is an elected official.

  — **Spend most of your effort on your supporters and the neutral targets.** Their support could be the key to your success. You will have to spend substantial time with these people finding out more about their ideas about gifted and talented education, and building their ideas into your proposal. This way they will feel they have a stake in the effort, and will become more solid supporters. Also, work with these people to inform them about current programs for the gifted and talented. Bolstering their knowledge about the subject will make them more effective in convincing their fellow decision makers to vote for your proposal.

Phase Two: Planning

"Whew!" may well be your reaction at this point. What was outlined in the needs assessment is a lot to do before you start planning. A thorough needs and political assessment takes a lot of your group's "person hours," but it will pay much greater dividends than any other time investment. If you have followed most of the process outlined so far, you will now have a better overview of the maze you are about to enter to get approval for your request. You will waste less time running into dead ends and doubling back to find your course. You will also know the best and shortest way to get to your goal. Best of all, you will have "warmed up" many of the decision makers by meeting with them and getting their ideas. So now you are ready to work on the following questions:

- What do you want to happen (within the political and economic limits of your area)?
- How will you present your request/idea to the decision makers?
- How will you "get the votes"?

What Do You Want To Happen?

Your group can use any of the many group processes for reaching consensus and making decisions. Regardless of how your group chooses to come to agreement, you will need to have reached consensus on the following before you move out of the planning phase:

- What are the strengths of your school district/state that are helping to meet the needs of gifted and talented children? No matter how bleak it may seem to you there *are* some good things happening that help develop outstanding abilities in students. List them. You will need this information later.
- What needs to happen in your school district/state over the next three years to better meet the needs of the gifted and talented? The data from your needs assessment will help the group make these decisions based on fact rather than opinion.
- What are your priorities? What you will work to achieve this year? Next year? The year after that?

After your group has made these decisions, you will have your basic goal for this year's efforts and you will be ready to prepare your "request" for the decision makers.

- Maximum and Minimum Requests

  In deciding on a request, advocates often feel that it is best to shoot for the moon, so that you will at least land on a star. Watch out! you could be left hanging in a void. Decision makers do not take kindly to what they see as unreasonable requests. They will think that you are insensitive and ill-informed of the real problems in education. Also, they are not likely to be willing or able to take your request and trim it down to something more manageable with current political and economic constraints.

  Do not risk getting trapped in an all-or-nothing situation. First, look at the information you gathered while talking to decision makers in Phase Two of the needs assessment. Then think about the goal your advocacy group set for this year. Work out a compromise between the two. As a group, set a reasonable "maximum request": that is, the most you can hope to get in policies, funding, services or other resources given the political and fiscal restraints now operating in your district/state. Getting that request to the appropriate decision makers and getting their approval will be your objective this round.

  After you set your maximum request, set a minimum request: that is, what the group feels is the "rock bottom" for getting something, even a small something, done to improve gifted and talented programs in your area. You may not have to back down to the minimum request, but knowing what the group considers to be rock bottom will enable the advocates who are presenting the group's request to quickly make a second proposal if the first, maximum request, is rejected. The idea behind settling for the compromise request is to keep your foot in the door. You can still get some of the resources you need, use them wisely, then come back for more next time.

  Let us look at an example. A maximum request in a district may be to establish a special center for advanced humanistic and scientific studies for gifted high school students. A minimum request that would still address a priority to serve the older gifted student, might be to sponsor a series of honors seminars to be offered to gifted students in the high schools.

How Will You Present Your Request?

- In Writing

  Now that you have a request in mind, you need to prepare a brief proposal. Don't get too nervous about this because all you need at this time is a 2-3 page proposal. Formulating this proposal will serve two key purposes:

— It will help serve to "check" your request. By having your group think out the request in detail you will be able to make sure your idea is realistic. You may find that what you thought was a good idea could not be easily implemented even if you managed to slip it past the decision makers. Even if you were to win approval, you will likely lose in the end if your idea runs into serious implementation barriers and your credibility as an advocacy group is damaged.

— It will impress the decision makers. A brief written proposal will demonstrate that your request is well researched. This will help diminish the opposition your idea may have from those who vote down new ideas because they *feel* it will not work. The proposal shows the decision makers that you have done your homework, and that what you propose can be done.

Your proposal should have the following elements in roughly the same order as listed below:

— Summary

One or two paragraphs stating what you want to accomplish for gifted and talented children in your district/state as outlined in the rest of the proposal.

— Introduction

What is currently being done for the gifted and talented. Present some of those district/state strengths you outlined earlier. Make it sound as if good things are already happening and you just want to expand on them. This way the idea you are presenting will not be seen as completely new and you will avoid the inevitable resistance decision makers have to new programs.

What special needs are not being met. Outline the results of your needs assessment.

— Goals

Explain the goals your group set for the gifted and talented for this year.

— Management Plan

Outline your expectations about what it will take to implement the program: staff, space, transportation, number of hours of instructional objectives, and your plans regarding evaluation of the program.

— Budget

Your proposal should show costs. For example, if you are requesting that the district expand a program adding two teachers and a full-time coordinator, you should outline the costs. Include personnel costs, materials and supplies, special equipment, transportation, etc. If some of the necessary resources are already available or have been donated, then list them in the budget and explain that the items will not cost the district additional money. Including "no-cost" resources from the program will demonstrate that you have tried to hold the costs down by using available people, materials and equipment.

— Outcomes

Explain what the program will do for the gifted and talented children, for the "average" child, for the staff, and for the community. Do not promise more than you (or anyone else) can deliver.

I suggest that you use headings—just as you see in this article—to guide readers. Do not exceed five double-spaced pages, as a longer proposal may discourage decision makers from reading it. If you want to give more information in writing, such as a more detailed description of current programs or the results of your needs assessment data, then use attachments. Keep the entire proposal, appendices and all, brief.

- Orally

After you have mapped out your proposal in writing, plan the oral presentation to be given by you, or one member of your organization. The presentation should be written in five-minute units. The first unit of five minutes should cover your most important points and lay out your basic request, much like the summary of your written proposal.

The next unit(s) should give the next most important details regarding your points. The last unit should be for questions from the decision makers and to polish off your request by restating the positive outcomes you anticipate.

The unit system will help you think about the most important things to say about your request. It will also be invaluable if you arrive to make your oral presentation and discover that the decision makers are tired, irritable or rushed due to an overloaded schedule. The units will help you to do an on-the-spot trim of your presentation to meet the time contraints.

How Will You Get The Votes?

Earlier, I talked about other professions and the different skills they require that you must also have as an advocate. I omitted one profession—the military leader. You will need their ability to map out a master strategy that will use all the troops in the most efficient manner to achieve success in the big battle ahead.

During this part of the planning your group will need to develop an Advocacy Plan. Maybe a few people who have some sense for politics and how to get things done in your district/state should draft the plan. Then the group can review, fill in details and volunteer for assignments.

The Advocacy Plan is simply an organized, group-validated way of attending to the who-how-what issue of getting support for your request. Do not spend too much time polishing the wording of the Plan, just make sure it addresses the following:

- Which non-supporters (remember your political analysis chart completed during part two of the needs assessment) represent a serious threat to your advocacy effort, and must be neutralized? How can you work on them directly to neutralize their views? How can you work on them indirectly, or through your friends and contacts, to help neutralize their negativism?
- Which neutral decision makers do you need to get approval for your request? How can you work directly and indirectly to shift their views to a more supportive position?
- How can you strengthen all your supporters? How can you encourage some of the more important supporters to become more outspoken, and to use their influence to get approval for your requests?
- What can you do if one of your most outspoken supporters is not well respected by his/her fellow decision makers? How will you find someone who is respected and is willing to be an active supporter? (Many advocacy efforts for the gifted and talented have died a quick death because the most visible supporter was a decision maker who was seen as a "dud" by his/her colleagues.)
- How can your group structure itself to work on building support, as well as to conduct any research activities for preparing the oral and written presentations?
- Which person will serve as coordinator of the total group's efforts? How will they be kept informed of scattered activities and how will they modify or redirect the total group effort as needed?
- What are the timetables for the tasks? Are these realistic and compatible with the school year; with the decision making schedule of your primary targets; and with the personal schedules of key leaders in the advocacy effort?
- What are the tasks and in what sequence will they be performed?
- Who will be responsible for each task? Who will assist? How/when will they report back to the group?

The plan should provide enough detail so that everyone understands what is to be done, who is responsible and how and when it will be accomplished. Don't agonize over this plan. Write it as quickly as possible, then be prepared to make revisions. If too much group time is consumed with creating the plan, the group is more likely to be upset when the inevitable changes occur.

Phase Three: Contact

There are many ways that you can make contact with decision makers and communicate your concerns for gifted and talented children. The most common vehicles are more formal, such as writing a letter or making a presentation.

Undoubtedly you will have to present your request in a more formal way. You should lay the groundwork for that formal presentation by finding ways to make contact in more informal settings. Use the informal contacts as a way to build support throughout the year, but particularly in the months preceding a formal request.

Informal Contacts

Some of the more creative ways of gaining a forum for discussion (and a little soft selling!) with decision makers are:

- Inviting them over for a picnic, a potluck dinner, a Saturday brunch, a Sunday coffee, a weekday luncheon, etc. sponsored by your advocacy group. You can discuss the educational needs of gifted children in the informal and congenial atmosphere that usually surrounds a "food function."
- Putting them on the program of a workshop, conference or meeting sponsored by your advocacy group.
- Sponsoring a district-wide awards ceremony at the conclusion of a gifted program, and having them give out the awards.
- Helping with the campaigns of candidates seeking an elected decision making position. Your group can assist by providing volunteers; by mailing a small contribution (with a note attached encouraging their support of gifted education); by inviting them out to a gifted program and getting the press out.
- Taking them out to lunch, for a drink, or coffee and a one-to-one discussion.

Do not feel reluctant to make contact with a decision maker in a social setting. This is one of the best ways to get the attention of a decision maker, and to have the opportunity to communicate with them. Do not forget decision makers are people too. They enjoy talking with their constituents in more personal and congenial settings.

Formal Contacts

The most difficult situation for making a contact with decision makers is a formal presentation to a board of education, the legislature or one of their committees. Not only are you as an advocate feeling tense, but the decision makers are probably feeling uneasy. It is an uncomfortable situation for both of you.

They as decision makers are facing an audience who studies their every move and comment. They are expected to ask intelligent questions in areas they may know very little about. And they are expected to make decisions that will be fair to all concerned sides, and will still be economically and politically feasible.

You as advocates are thrust in an unfamiliar setting. You are in front of a group of persons who will decide whether to grant or deny you something you feel is essential for the well-being of gifted and talented children. You feel put on the spot, and you are.

Given the tension of the situation you will want to put in some extra hours of preparation and rehearsal before a formal presentation. Some guidelines that may help you get ready, and successfully survive this situation are as follows:

- Select the right person to make the presentation

  Your group's elected leadership may or may not be the most effective public speaker. Choose someone who speaks well, even in tense situations. Someone who expresses ideas in a logical, easily understood way. Someone who seems to get along well with all types of persons, who is a naturally non-threatening, amiable individual. A checklist that your group can use to select the right person is given in Appendix B at the end of this article.
- Be careful in your use of audiovisuals

  First, go and check out the room in which you will make your presentation. Make sure that all of the decision makers can easily and *comfortably* see any audiovisuals you are planning to project on a screen or wall. Overhead transparencies and films are probably to be avoided as the time for set up, the chances for mechanical failure, the awkwardness of dimming and relighting a room, and the break it creates in the flow of a presentation will hinder your effectiveness. Large charts or figures displayed on handouts are better. If you use hand-out visuals, give them out at one time and know who will help you distribute them quickly to the decision makers. Do not crowd charts or handouts with too many figures or words. Use visuals to highlight points, not explain them.
- Go to the meeting early

  Ideally you will have observed the group of decision makers before so that you will know how to prepare for your own presentation. On the day of your talk, go to the meeting long before you are scheduled to present. Observe the group. Learn how they respond to different styles of presentations and speakers. Determine their mood so you can adjust your presentation accordingly. If they are tired, feeling pressured by an overloaded agenda, or if their patience was tried by an earlier discussion, cut your talk down to the bare essentials. Remember, more is not better. If they do not attend to your presentation, your content and delivery will be wasted.
- Assume they are supportive

  Write and deliver your presentation as if the people you are talking to are supportive of your ideas. It will minimize any adversarial feelings that sometimes pollute the atmosphere when advocates come before decision makers with a request. If your words and manner assume that they are supportive, they may meet your expectations. Also, adopting this stance will help you hold down the time you talk about "why" they should approve your request, so that you can spend your minutes explaining the details of your well-planned proposal.
- Use plain English

  Give your presentation to a next-door-neighbor, or a friend who is not an educator and knows nothing about gifted and talented programs. Have them write down every word or phrase that they do not fully understand. Then eliminate those words from your presentation.
- Be human

  Spice your presentation with a real-life story or two. We all love stories and are likely to remember them long after the facts and figures have blurred in our memories. However, I suggest you avoid stories about your *own* gifted children.

Phase Four: Evaluation and Followup

At last, the long hours of planning are completed, the contact has been made and your group heaves a sigh of relief. But it is not over yet. Even if you were very successful in presenting and obtaining what you requested, you and your fellow advocates need to finish the process. Maintaining your attention and energy through this final phase is essential for success with your next effort.

First, you should spend some time individually and collectively reflecting on the contact you have just made.

- What did you learn about the decision makers, about how they think, their attitude toward gifted and talented education?
- Looking back on the needs assessment and all of your contacts, did you ask questions designed to get useful information from them, not put them on the defensive? What seemed to be their concerns regarding gifted and talented education?
- Did you have accurate, concise answers to questions asked by decision makers at any point in the process? What information will you need to have next time?
- Did you promise to get back to them with any information you did not have at the time of the contact? Is that information now in their hands? (You should rarely take more than one week to get back information promised).
- How would you improve your own handling of the contacts? What knowledge and skills will you need to acquire?

Second, you need to followup with personal thank you letters to the decision makers. You should also write and thank the people in your secondary target groups who were supportive of your efforts. All of the members of your own organization need to be praised, with special recognition for those who contributed extra time to the effort.

Finally you need to channel the energy that lingers after a big push. If you were disappointed with the results, direct your frustration into mapping out a strategy for the next effort. Reexamine your primary group and why the contact was not completely successful. You may have to work back through your analysis of the system:

- Did you choose the right primary target group?
- Did you know and honor all of the formal and informal group rules?
- Did you need to do more groundwork in building support with your secondary target groups?
- Do you need to shift now and focus on another group of decision makers?

You should move into Phase One of the next effort now in order to renew your group's interest and confidence. Outline a new Advocacy Plan with tasks, persons responsible, and timetables.

If you were successful, it is even more imperative to return to planning what you will accomplish next. Complacency is a common and deadly malady in advocacy groups who feel they have been successful. They secure some programs, at least for their own children, and they settle back for a rest. But programs that are set up as a result of outside pressure are very vulnerable. When that pressure dwindles or disappears, the programs likewise tend to fade away. So if at first you *do* succeed, keep trying!

Litigation: An Alternative to the Advocacy Process?

"The heck with all that assessing, planning, contacting and follow-up" you say. "I'll sue. That will get things moving." But before you reach for the telephone to call a lawyer you should realize that there has not *yet* been a court ruling which directly supported special education services for gifted and talented children.

Three years ago, a much-publicized case involving Tommy Irwin, an intellectually gifted elementary school student in the McHenry School District near Chicago, Illinois, was brought to court. The plaintiff contended that the school district had failed to provide an adequate education for Tommy. On a motion from the plaintiff, the case was dismissed in the lower court. The plaintiff did not pursue the case in appellate court for two reasons: (1) the primary witness had a stroke; and (2) Mr. Irwin, Tommy's father, felt that if the case "succeeded" the likely outcomes would not be what they had sought in the first place.

It is possible to envision a "successful" court case on behalf of exceptionally able students, especially if the students were highly gifted. There would also have to be a very obvious discrepancy between what the school was providing and what the child's abilities demanded.

Even "unsuccessful" court cases can have their advantages. Litigation raises the issue that gifted children have unique learning needs and that their needs require some services beyond those provided in the regular classroom. Also, school districts do not like being sued. Even when they feel they can "win", they may elect to start a program rather than fight in court.

There are also some disadvantages to using the courts as a tool for advocacy:

- **Time.** The process from filing a suit until a final ruling emerges from the appeal can take years. During that time the district may resist meeting the needs of the child because of the adversarial atmosphere over the issue.
- **Money.** Taking a complaint to court is very costly.

If after thinking it through, you still want to call a lawyer, I suggest you first contact the Council for Exceptional Children, 1920 Association Drive, Reston, Virginia 22091, Telephone 703/620-3660. Fred Weintraub and Joe Ballard in the Government Relations Unit have followed court cases for exceptional children over the years and would be able to advise you on the pros and cons of a lawsuit.

Litigation is not really an alternative to using the advocacy process. It is a tool to be used at the right time and for the right reason.

Before closing this article I would like to share the words of a leader who has worked for decades to help change attitudes towards a minority population, Reverend Jesse Jackson.

"Both tears and sweat are salty and wet, but they render different results.

Tears will get you sympathy, but sweat will get you progress."

Appendix A

Political Assessment Summary Chart

	Possible Targets	Do You Need Their Support?	Where Do They Stand? What Are Their Concerns?	Strategy To Strengthen Supporters And Get Support From Neutrals
State-Level	Governor/Staff			
	Legislature Finance Committees Education Committees Leadership			
	State Board of Education Leadership Committees			
	State Department of Education Commissioner/ Superintendent Top-level Management Mid-level Management			
	State Teachers Association State School Boards Association State Administrative Association			
Local-Level	Local School Board Leadership Committees			
	Local Education Agency Superintendent Management			
	Principals			
	Teachers			

Appendix B

Nomination Form To Select Group Members Who Will Make Formal Presentations To Decisionmakers

Directions: Have each member of your group complete the form. Then one of the group's leaders, or else an outsider to the group, should compile the results. The person(s) whose name(s) appear most often should be named as potential nominees to make the presentation. From the list of potential nominees, the group leadership may wish to eliminate any nominee who is "notably-out-of-norm," that is they are *much* more wealthy, or *much* better educated than most people in the community, are "newcomers," have unusual mannerisms, etc. From the final list of nominees, the leadership, or the entire group, can select the person who will finally make the presentation.

Name the persons who seem to best fit the descriptions below. You may name the same person as many times as the description seems appropriate.

Is active in civic/community organizations and frequently holds leadership positions in them.	_____	_____	_____
Expresses ideas well in front of a group.	_____	_____	_____
Seems naturally confident but not arrogant.	_____	_____	_____
Answers questions directly and effectively.	_____	_____	_____
Is a generally likeable person.	_____	_____	_____
Makes a good first impression.	_____	_____	_____
Knows a lot about gifted and talented education.	_____	_____	_____
Has a knack for explaining things in a simple, straightforward manner without sounding like he/she is talking down to anyone.	_____	_____	_____
Has a good sense of humor.	_____	_____	_____

Appendix C

Resources For Advocates

American Association For Gifted Children
15 Gramercy Park, New York, New York 10003
Telephone: 212/473-4266

This national organization has developed two publications that will be of use to advocates for the gifted. The first has only one chapter on advocacy for the gifted but many other useful articles for parents. The second is completely devoted to the topic of advocacy.

- *The Gifted Child, The Family and The Community.* Bernard Miller and Merle Price, Editors. Cost per copy is $17.50.
- *Reaching Out: Advocacy for the Gifted and Talented.* Abraham Tannebaum, Editor. Order from Teachers College Press, 81 Adams Drive, Totowa, New Jersey 07512. Cost per copy is $5.50 plus $1.00 handling and postage.

Council For Exceptional Children
1920 Association Drive, Reston, Virginia 22091
Telephone: 703/620-3660

The Council for Exceptional Children is a major resource for parents and professionals who are concerned with gifted and talented children. CEC has numerous publications on the education of the gifted, staff specialists in gifted education, as well as a unit of persons expert in political processes and advocacy for all exceptional children. Membership in CEC and their division "The Association for the Gifted", known nationally as TAG, will provide you with regular periodicals to keep you up-to-date with research and program ideas, as well as discounts on CEC publications and registration fees at their meetings.

Two of the CEC publications will be particularly useful in political advocacy for the gifted:

- *Parent Advocate Groups for the Gifted and Talented.* John Grossi, Editor. This ERIC Exceptional Child Education Report provides the names, addresses, contact persons and basic information on the activities of over 100 parent/professional organizations concerned with education of the gifted and talented. The ERIC Clearinghouse at CEC has limited copies available, so limit your request to a single copy and enclose $1.00 to cover postage.
- *Public Policy and the Education of Exceptional Children.* Frederick Weintraub, Alan Abeson, Joseph Ballard and Martin LaVor, Editors. Included in this 1976 publication is a very useful article for advocates entitled "Politics: The Name of the Game". Order Stock Number 123 and enclose payment of $14.25 per copy with your order. Include an additional $1.43 (10% of cost) if you want your copy mailed first class.

Council Of State Directors Of Programs For The Gifted
Suite 526, Hall of the States
444 N. Capitol Street NW, Washington, D.C. 20001
Telephone: 202/624-5845

An up-to-date list of the state directors of gifted programs is available on request from the Council. Also, until the Fall of 1982 single copies of general information packets for parents and educators are available. The Council is also a good source for current, accurate information on the state-of-the-art of gifted education such as levels of state appropriations, number of students served in each state, states developing teacher certification standards, states with mandated gifted programs, etc.

Gifted Advocacy Information Network, Inc. (GAIN)
225 West Orchid Lane, Phoenix, Arizona 85021
Telephone: 602/944-2324

This non-profit, private organization publishes a newsletter that contains advocacy methods, news from Washington, D.C. and the states on programs for the gifted, and other information parents and professionals will find useful. A contribution of $5 for individuals and $10 for groups entitles you to be Supporting Members of this nationwide network of advocates for the gifted.

League of Women Voters
National Headquarters:
1730 M Street NW, Washington, D.C. 20036
Telephone: 202/296-1770

The headquarters of this well-known organization can give you information on how to contact the president of your state and local chapters of the League of Women Voters. These chapters are led by persons who are very knowledgeable of state and local decision making processes. They may be willing to give your group some advice as you plan your strategy. Also, many chapters offer seminars on political processes. In more than one state it has been the support of the League of Women Voters that has made a difference in getting state decision makers to look at the issue of gifted education.

National Association For Gifted Children
2070 County Road H, St. Paul, Minnesota 55112
Telephone: 612/784-3475

Membership in NAGC will provide you with the well-known journal, "Gifted Child Quarterly". NAGC has recently produced two publications that will aid advocates by telling them more about successful programs in other states, and how to form their own gifted organizations. Annual membership dues are $26 for individuals.

- *Successful Programs for the Gifted and Talented.* Joyce Juntune, Editor. Orders should be accompanied by payment of $12.00 per copy.
- *Chapter Development Packet.* Orders should be accompanied by payment of $5.00 per packet.

National PTA
700 N. Rush Street, Chicago, Illinois 60611
Telephone: 312/787-0977

The National PTA publishes two brochures: "The Principal and PTA: Partners In Education" and "The School Board and PTA". Both are available at $.05 per copy or $4.00 for 100. The National PTA can also give you information on how to contact the president and state legislature chairperson of all of the state PTA organizations. Many of these state organizations have training to help parents understand how education decisions are made at the state and local level.

Other Useful Publications For Advocates

- *An Administrator's Guide to the Education of Gifted and Talented Children.* Joyce Van Tassel-Baska, Author. This 60 page monograph was designed for school superintendents and top-level staff who need a quick-to-read overview of gifted children and how to meet their unique needs in schools. It may help advocates in planning "overview" presentations, or they may wish to give it as a "present" to their favorite administrators! Order from National Association of State Boards of Education, 444 N. Capitol Street NW, Washington, D.C. 20001. Enclose $7.50 per copy with each order.

- *A Policymaker's Guide to Issues in Gifted and Talented Education.* Patricia Bruce Mitchell, Editor. This book examines key policy issues in gifted education such as: mandate vs. permissive legislation; state definitions of the gifted and talented; methods for funding programs; minimum program standards and procedural safeguards. Advocates will find the information on the different sides of these issues helpful in presenting their viewpoints to decision makers. Order from National Association of State Boards of Education. 444 N. Capitol Street NW, Washington, D.C. 20001. Enclose $7.50 per copy with each order.
- *A Guide for the Powerless—and Those Who Don't Know Their Own Power.* Samuel Halperin, Author. The author has worked for two decades in a variety of key positions in the federal world of education decision making. His newest monograph is a gem for advocates as it covers in just over 40 pages many important concepts for those who wish to access and participate in political processes at the federal, state or local level. Order from the Institute For Education Leadership, 1001 Connecticut Avenue NW, Suite 310, Washington, D.C. 20036. Enclose $3.00 for each single copy. Orders for ten or more are discounted 10%.
- *Let Our Children Go: An Organizing Manual for Advocates and Parents.* This slightly dated book primarily addresses advocacy for parents of handicapped children but will still be very useful to advocates for the gifted. The contents focus on six steps covering such key areas as building alliances, identifying community needs and learning to use power. Order from Human Policy Press, P.O. Box 127, University Station, Syracuse, New York 13210.

Parent Power: Starting and Building a Parent Organization

Theodore Kraver

So you want to get involved in gifted education! You want to "do something" about gifted education in your local school. Your motivation may be your child or your desire to save the world. If you want immediate solutions to your child's immediate needs, please ignore the rest of this article and immerse yourself in your local school to bring its current resources in line with your child's needs. If, on the other hand, you have a more long-range vision of how the school district can serve the needs of all our gifted children, read on. But beware, advocacy can be addictive and dangerous to your leisure time. We have some knowledge and anecdotes to share with you, to help you down a path that we have tread. As for the wisdom, energy, intuition and leadership you will need to make your own group work, we will have to leave that up to you.

Getting Started

Good leadership has been crucial to the success of most effective advocacy efforts. Unfortunately, though, it is impossible to predict who will make good leaders: leadership depends too much on the situation. But in keeping your eyes open for possible leaders, remember that the individuals who will guide your group's efforts must be the "keepers of the dream." They must also be pragmatic enough to package the group's goals to increase its chances for success.

First think about what kind of gifted program you would create if your resources were limitless. Allow creativity to flow and ideas to generate. Focus on a mission and a sense of purpose that will hold your group together when you face the inevitable constraints and problems. You might begin your explorations with these ideals:

- Every gifted and talented child should be identified.
- Special education programs should be provided to insure that each of these children has the opportunity to achieve their potential.

Then think about the fundamentals you will need to realize those dreams.

Local Success Is Built On Fundamentals. Among the fundamentals you will need are a legal structure and support from the "consumer." These can take the form of a written philosophy and program adopted by the board of education. Funding that will be adequate to underwrite programs for all gifted students in the district is another basic need. A skilled coordinator with definitive knowledge of gifted education, outstanding management skills and the ability to train teachers, and a cadre of skilled and trained teachers will also be critical to the program's success.

Learn Of The Need Outside Of Your Local Area. Investigate the gifted world beyond your community. Talk to state level experts and find out whether:

- programs for the gifted are mandated by the state or result from local initiative;
- there are any trained teachers or university programs for teachers of the gifted;
- gifted programs are considered innovative and therefore may lack both roots and acceptance;
- there is community concern about whether the gifted succeed or fail.

Forming A Parent Group

Theoretically, there are many ways for scattered groups of parents to advocate gifted education for our children. A single parent with political clout can force a program. A group of determined parents can launch a small "guerilla action" that will lay a good smokescreen and allow the group to meet its objectives one by one. A formal parent organization can establish its credibility through numbers and activities and then attempt to influence the course of gifted education.

While timing, resources, and the attitude of the school district toward gifted programs will play a major role in the success or failure of these methods, experience

favors the last approach. Personal clout is rarely successful in the long run. Guerilla action can start the process. But sustained program support requires evolution into a formal organization.

The first step in forming a parent group is to pick a place and call a meeting of all interested parents and school professionals. Go heavy on the advertising and publicity. Ask someone to take addresses, names and telephone numbers of those attending the meetings.

Invite an "outside expert" to give a 20-25 minute overview of gifted education. The presentation should cover the need for differentiated education and the types of programs (primary, middle, junior high, and secondary); give an overview of both your state scene and the national scene (legislation, funding, support); and finally, include illustrative "success stories" of how other local districts have had successful programs through constructive parent support. You should also have a representative of your district(s) present a 15-minute overview of current programs and plans.

Use the next 20 minutes for parent questions and comments—usually spiced with anecdotes of their children and their frustrations—to marshal the group's energy and enthusiasm toward your goal of organizing. When you feel the timing is right, seize the opportunity and get the group to decide to become organized in support of gifted education. Pick a volunteer steering committee, and you're on your way!

Adjourn early enough for the steering committee and the outside expert to meet over coffee to help solidify details. Before you adjourn, have someone take names, addresses, and telephone numbers from everyone who attended the meeting.

Barely has your glow of victory faded when you realize the extent of your commitment. **I Am Responsible For Something That I Know Little About, You Think. What Do I Do Now?** Have faith, and read on.

First, forget the fantasy that because 50 people signed up, you have fifty devoted workers behind you. Five is probably the real number, which is all you really need to start. One "Fantastic Five" in Arizona took an $18,000 program with a few classes to a $300,000 all school and grade level program in about two years. Although five people did the work, having the credibility of a formal organization behind them was a major help. This is where your steering committee—usually comprised of between four and seven people—comes in.

First, pick a name for the group. The hassle over using the word "gifted" can take 10 minutes or 10 hours; don't waste too much time on it. Decide which school districts will be the focus of your group. Set your dues—they usually run between $5 to $10—and membership requirements. Most groups open their membership to anyone interested in gifted and talented education.

Then decide on the frequency of board meetings and general meetings. Board meetings are usually held monthly and general meetings less frequently. Get sample copies of by-laws from other groups to use as models, and prepare your by-laws to fit local conditions. Keep them simple. Finally, submit the steering committee-approved by-laws to the general membership for their approval.

You are now an "official" (although self-appointed) group. Get a letterhead ($20.00), and post office box ($10.00) or a stable local address. It also helps to have a list of prominent people on your "Advisory Committee" down the side of your letterhead.

Not-For-Profit

(Federal 501-C-3)

Many advocacy organizations have found it useful to incorporate under the non-profit umbrella. A member who is also an attorney can file the necessary forms at a cost of one to two hundred dollars. You might also consider becoming a chapter of a gifted organization that is already established as non-profit, such as your state association. There are several pros and cons to consider before taking either route.

If your group affiliates with an IRS non-profit corporation, all dues, donations and member expenses become tax-deductible. You also put the group in a position to attract dollars from the local businesses. You may be able to purchase inexpensive riders on the state group's insurance policies to cover group activities; e.g., summer school, Saturday seminars, meetings for parents or children held in school buildings. Your members will receive the state newsletter. You may use the state association's bulk mailing permit—a major resource at $.03 a copy—and you can also call on the resources of the state association for guidance. Most important, you can be a part of the governing process and help to influence change at the state level: instead of acting alone, you will become an informed participant in the education of your state's gifted children.

There are a number of potential disadvantages to consider. Each chapter member may have to pay state association dues in addition to local chapter dues. All local chapters must submit annual financial reports to the state association and the IRS. They must include a provision in their by-laws to adhere to the requirements of the state association's articles of incorporation and by-laws or pass a resolution to that effect, and must also agree to support policy decisions set by the state association.

Affiliation will usually be beneficial, but you have to check it out for yourself.

Once the flurry of organizing activity is over, dust off the original mission and objectives and see if they are still valid. Do they align with the current situation and the new group? Probably not. To do an overhaul and upgrade, bring your group together and:

- Examine the current condition of gifted education in your district(s) and decide on the needs, immediate and long-range. This is your most difficult task. The data is limited, conflicting information may turn up, member priorities will differ, and you will probably start knowing very little about the makeup of a good gifted program.
- Examine the materials and plans of any program your district already has in effect.
- Obtain and read the references listed in Appendix A.
- Study state guidelines for gifted programs and other resources.
- Travel statewide to visit and evaluate existing programs.
- Visit programs in other states.
- Attend national and state conferences on gifted education to increase your knowledge of current philosophy, attitudes, methods, and research results.
- Work with experts on gifted education to help set up the details of your proposed program.
- Allow professionals to develop the program. Be very careful to remain in your role as advocate. Your job is to help establish and maintain a system so that they can work more effectively in their roles as administrators, curriculum specialists, and teachers.
- Don't try to solve every problem at once. The most speedily developed programs have taken five years—two to three years to adequately serve students, and another two years to integrate the program and work out the "bugs."
- Don't allow distant goals to stop immediate action. There are always critical school board meetings and budget deadlines to be met in order to develop that program in a two-year span.

Involving the School District

All this planning will be a useless, sterile exercise if it is done off to one side by your self-appointed parent group. Somehow you must first work your way into the decision making apparatus of your local district. One proven way to do this is by forming an advisory board.

A fully sanctioned, parent-professional advisory board can be a powerful force for developing and supporting gifted programs. This forum has a high degree of

credibility because of its membership and will encourage maximum acceptance of proposed changes. The danger is that the board can also become a rubber stamp that traps advocates in a dead-end activity, and a disruptive influence on an already overloaded school management system. There are ways to accentuate the positives of an advisory board:

- Keep the board small. A group of no more than 20 carefully selected parents, teachers, counselors, and principals who can work with the superintendent and other professionals is ideal.
- Ask that the group be officially recognized by the school board and appointed by the superintendent.
- Have the group produce its own by-laws and charter of activities, and elect its own officers. The advisory board is separate but parallel to your parent group.
- Suggest that the board help develop a job description for a program coordinator if your district doesn't already have one. The board can also serve as part of the interview team.
- Give the advisory board responsibility for formulating recommendations on program philosophy, goals and objectives for approval by the district administration and the school board.
- Be sure the advisory board avoids administrative tasks such as evaluating teachers and developing program details. Its responsibility is to ensure that there are competent professionals performing these tasks in a workable system.
- Encourage the board to serve as a forum for input about the program and as a creative force to maintain program growth.

Priorities Are A Function Of Program Growth

Expect different priorities at different phases of program development. At the beginning, focus on funding, program content, management, acceptance and support. Be very careful that formation of the parent support group does not divert critical energies from the initial advocacy role. Later, after the program is established, your main focus can be on program support. The following tricks of the trade can be used for both the growth and consolidation phases of the program.

The Newsletter

This may be your single largest investment of time and money. It can help create a cohesive group and build an image of your group as a force to be reckoned with.

Content and Style. As a minimum, an effective newsletter must:

- Cover current program highlights with information solicited from teachers and administrators
- Present analyses of program needs so that when formal requests come they aren't a big shock
- Use material from other newsletters and journals to educate your readers
- Announce all meetings and events
- Print simple, short articles to dispel the myths about the gifted
- Present positive facts on gifted children's needs in education and how these needs can be met
- Be written in a positive way in order to sell your cause. Abrasive newsletters may be refused distribution through the schools and cost you your major audience.

Printing. If possible, have the newsletter printed in an "instant print" facility, not mimeographed. It will be worth the small investment to look professional. Type the copy in the format you want, then cut and paste it up on cardboard. Use rub-on letters for headings and titles. Your copy can be photo-reduced to fit the finished paper stock size or it can be printed in its original size. The printer can fold and/or collate the pages.

Distribution. With the approval of your district, copies can be sent home with children enrolled in gifted programs and distributed to all teachers and administrators. You may have to prepare the labels for the latter.

Prepare a mailing list which may include the following groups:

- All members of your organization
- All teachers, principals and school board members
- VIP's such as your congressman, the mayor, and newspaper publishers
- Other state and local parent group chapters
- Members of the state association board of directors
- Local private and pre-schools
- All individuals who have shown an interest by attending meetings (always have an address sign-up sheet) or with whom you have had phone contact

Address labels for mailing can be purchased from a stationer's store and xeroxed from your typed master list. The self-adhesive type are most convenient.

Use your non-profit bulk rate permit for mailing, and mail thousands of copies. Your newsletter will amount to a monthly (or more frequent) major direct-mail advocacy piece.

Creating Public Awareness

The parent support group will create public awareness of the need for a comprehensive gifted program.

- Call monthly public meetings for parents, teachers and the community with films, speakers and activities that focus on gifted education. Check your speakers and have your film projectors in place well ahead of schedule. We had one poor speaker which set back meeting attendance for months. One show went off on schedule but the film arrived in the mail 4 hours before the meeting, the projector only 20 minutes early, and the replacement bulb 5 minutes late. *Be prepared.*
- Develop contacts with local newspapers and promote coverage of all local and statewide activities for the gifted.
- Develop contacts in the district and schools in order to use school newsletters to publicize your activities.
- Make formal presentations to school boards, administrators, and other service organizations.

What is most important, however, is that you stay in close and constant contact with your "immediate" network. Continue to publish your own newsletter regularly. Use "Flash Reports" to highlight critical action items. Make systematic one-to-one contact with all the people who make decisions concerning gifted programs, and let them know who you are and what you want. There is absolutely no substitute for interpersonal rapport when it comes to accomplishing your goals.

Recruiting Members

To keep your organization active and growing you will have to recruit new members almost constantly. Here are some proven methods of doing this:

- Print an application form on the back of your newsletter.
- Solicit new members at every meeting.
- If you help sponsor a conference, training workshops or institute, or even a program for students, charge a registration fee that is substantially lower for members so that people will be happy to pay the dues to get the registration discount.
- Appoint an active membership chairman.
- Ask to be part of the agenda during the introductory meeting for parents of students enrolled in gifted programs each fall and ask for new members.
- Ask professionals from the district's gifted program to join.
- Ask the parents of children who attend your special activities to join.

- Put new members to work on something the minute they join. Spread the work around to keep members involved but not overworked.
- With the approval of your district, send fliers home with students.

And remember, the best recruiting method is still one-to-one, over coffee, with individuals who have expressed interest in your organization.

Support Activities

Once you have established a local program, switch your emphasis from advocacy to mutual support. This is one of the toughest tasks your group will face. Many parent groups go out of business at this point, and you may find that you need to change leadership. Many agents of change are not able to manage the consolidation phase in an organization. You might want to consider several of the activities listed below.

Summer School And Special Activities. Summer school can be a money maker while serving a real need. Neighboring local groups may be able to give guidance on how to get started.

Teacher Aides. Organize your members and other community people as resource people for the teachers of gifted classes. Bringing gifted students together for play activities such as Saturday field trips, parties and game days, can have real pay-offs in the classroom for students and teachers. Set up mini-parent groups at each school to aid its program and teachers. Raise funds for special scholarhips and equipment for the district program.

Evening Programs And Seminars. Show parents how they can learn how best to pursue the opportunities available and handle the problems of their gifted children.

Lobbying. Help your members learn the legislative system and show them how to stay active in supporting adequate state and federal legislation for the gifted.

State Activities And Inservice Programs. Support state activities and conferences. Sponsor them in your area. Fund special inservice programs for the teachers and travel expenses for them to attend special workshops and conferences; don't forget your coordinator.

Your work with people involved in gifted education can be a rich and exciting part of your life. It is possible to set the time with creativity, love, and celebration, making this parent group process self rewarding as well as serving the needs of our gifted children.

Organizing for Advocacy: Making It Work on the State and Local Level

Lyn Aubrecht

North Carolina is most fortunate, from the standpoint of education for the gifted. State law requires special education for gifted youngsters just as it requires special education for other "exceptional children." North Carolina ranks third among the states in money spent on the gifted, even though it is only 32nd in per capita school expenditures and 39th in per capita personal income. Although there is still much to do, gifted children who attend school in North Carolina are indeed lucky—if only in a relative sense.

How did all of this good fortune come about? Some might say that it was due to the influence of a few good people in positions of importance and power. Others might say that it was due to the values and priorities shared by a large number of people in the state. Both views are almost certainly correct. North Carolina has been blessed with some good people in state government and in the state legislature, and also in having a tradition of valuing excellence. But one must add a third factor to this equation, advocacy organizations.

Advocacy Organizations in North Carolina

North Carolina has two major advocacy organizations for the gifted: Parents for the Advancement of Gifted Education (PAGE), and the North Carolina Association for the Gifted and Talented (NCAGT).

PAGE was founded in 1974 by Dr. LeRoy Martin, Jr., as a local organization of parents and teachers in Wake County, which includes Raleigh, the capitol. Although the principal purpose of PAGE has always been to encourage the development of local educational programs for the gifted, PAGE of Wake County was able to capitalize on its proximity to state government and support statewide efforts as well.

As other localities became interested in forming similar organizations, they contacted this PAGE group and received information about how to organize, along with the option to affiliate with the original "chapter." This allowed them to avoid many of the troublesome, time-consuming and costly aspects of preparing a constitution and filing for incorporation. PAGE also benefited in that virtually every local support group in the state became a PAGE chapter, and this in turn conferred a "statewide" identity on PAGE. While some PAGE members continue to maintain an interest in state issues, PAGE itself, now an aggregation of essentially autonomous local chapters, continues to focus primarily on local issues and concerns.

The NCAGT was founded in 1974 by Dr. Richard Stahl. Although the two groups frequently work together the NCAGT, largely composed of teachers, college professors and administrators, focused on state wide issues and professional issues from the beginning.

Over the years the NCAGT has expanded to include all individuals interested in promoting quality education for the gifted, and has also broadened the focus of its concerns. For example, it has taken an active role in working for increased funding within the state legislature; in providing for statewide communications and public relations; and in serving as a "concerned party" in such matters as implementation of the state law requiring special education for the gifted, identification standards, and teacher competencies.

The two organizations work well together. The NGAGT works to promote the formation of PAGE chapters, and many PAGE members also belong to the NCAGT. Local efforts certainly have benefited from NCAGT activities in the legislature; and without the support of PAGE members in key legislative districts, important NCAGT battles in the legislature might have been lost. Together, these two groups have accomplished things that "a few good people in positions of importance and power" and other individuals, working alone, probably never could have accomplished. They have provided expression for the values and priorities held by large numbers of people in the state.

Suggestions For Forming A Successful Organization

A desire to organize is simply not enough. Some advocacy organizations for the gifted have formed with high hopes and aspirations, only to fall apart a few months later. Others—including the NCAGT and most PAGE chapters—are doing very well after years of operation. Why? Part of the reason undoubtedly lies in general principles that apply to all organizations and special interest groups. But, some specific factors seem to have been involved again and again in the success or failure of several organizations for the gifted in North Carolina. These include: when and how officers are elected; whether or not the group encourages the continuous development of new leaders; the breadth of the organization's focus; and how the organization works with outside authorities. These factors will be examined in the following pages.

Electing Officers: How To Get The Best People Initially Available

In the rush to get organized and accomplish something, a logical first step seems to be the election of officers. This provides something that can be done immediately; it provides leadership for the organization; and it confers the authority of office on those elected. These people then can "officially represent" the organization. But in too many cases the election of officers is a disaster—one that no one is able to do anything about. Some organizations never recover from it.

An organization must elect the right person to the right office, and this is not a simple task. Often not enough is known about those running for office. Reputation or occupation are not enough. For example, one new organization for the gifted felt especially fortunate when a locally prominent young professional agreed to run for president. He was active in many community activities, and he had the advantage of being able to speak with educators in their own language. He won the election easily and started work on an agenda of meetings for the group, but family obligations and commitments to other activities always intruded. Phone calls to his home or office asking when the group would again meet brought the reply, "We're working on it." After several months passed without a meeting he could only say, "We've had some problems but we're going to meet again before long." The ultimate result was that the meeting at which the group elected its president was the first and last meeting the group ever had. It is vital to learn how particular people are going to function in conjunction with an organization and its issues *before* they are elected to office, and to assess their depth of interest and commitment. That may take some time.

Forming a steering or program committee to plan meetings and run the organization for the first few months is one way around the problem. Make this an open committee and invite the participation of everyone who has an interest. Make a convincing announcement to this effect at every regular meeting. Because this group will be meeting in addition to regularly scheduled meetings, everyone will have a better opportunity to get to know each other. Individual assets and skills will become more obvious. Those with a serious interest will attend these extra meetings and participate. Those with a limited interest will not. Individuals with specific abilities will have a chance to put them to good use. All kinds of complementary skills and abilities are required to make an organization successful—not just "leadership ability." Find and value a variety of people with a variety of talents.

In the end, it may become obvious whom the officers should be. In many cases they will be the very people who are already filling those particular roles. Their election will become a formality. But after these few are selected, the potential contributions of others on this committee who were not elected to office should not be ignored. Individuals in this group could be excellent candidates for your first board of directors.

Developing New Leaders: How To Keep Your Group Active And Responsive

Assume that a year or two has now gone by, and that the organization is fortunate enough to have an extremely competent, hard-working individual as president. It seems a shame to restrict such a person to one term. Or consider the position of the founder of the organization. After having put so much time and effort into the organization, he or she may be the only one who knows enough about everything to guide the group effectively. It is difficult for a group to "lose" such a person. It may also be difficult for such a person to relinquish control.

This poses a real dilemma. Organizations need good leadership and continuity. Perhaps a good leader should be given another term in which to initiate more changes, or to complete programs already started. Another possibility is to provide other organizational alternatives that serve the same purpose. Perhaps the administrative structure could include the positions of past president, president and president-elect. It should also be remembered that an individual can continue to provide artful leadership just by remaining on the board of directors.

But the problems in becoming a "one-person organization" or an organization stagnant with the continuing presence of the same individuals in decision making roles are equally difficult. Organizations that do not provide for the involvement of new individuals often find it difficult to develop fresh ideas, to remain responsive, and to grow. The smothering influence of an individual or a clique may actually discourage activity by their continuing presence, and encourage the development of new and perhaps rival organizations as the only way in which new ideas and new individuals can gain expression.

The first step toward a continuing solution of this problem is a continuing sensitivity to it. Current leaders of the organization must be willing to step back and share responsibility by giving others the chance to make contributions—and mistakes—and to learn by doing so.

Members who show any significant interest in the operation of the organization, or in particular issues, should be given the opportunity to get involved. Having an open board of directors is a real advantage here, as is the presence of active, working committees that meet and serve specific functions.

Keep in mind that new people often feel that they have little to contribute. The use of jargon and references to unfamiliar persons and "war stories" can add to that feeling. But new people obviously can make a contribution, given the time and the opportunity. When they do, they should be given the credit they deserve. You need them, for they are the real future of the organization. Organizations that actively seek to involve new members in meaningful and responsible roles within the group are likely to continue their vitality and to avoid becoming one-person organizations.

Keeping Your Focus Broad: How To Avoid Becoming A Single-Purpose Organization

Most new groups find it easy to identify one major concern. For local organizations this concern is usually the nature and the quality of the program for gifted children in the local schools. For state organizations it might be passage of legislation to establish and fund statewide programs for the gifted. It is desirable to set goals and priorities within an organization and to use resources efficiently to meet these goals. But it is undesirable, and perhaps dangerous to select one issue as the focal point for an organization.

What would happen to your group if it loses, or if its prospects take such a bad turn that it appears they may never get better? For that matter, what would happen if the group suddenly scores a smashing victory and gets everything that it has always wanted and more? It has happened both ways. Every group needs other concerns, other projects, to help it survive the lows, and even to keep moving after the highs. These other interests also serve to round out the organization and to

broaden its perspective. Organizations that have more than one purpose or concern generally are more stable over time, and tend to provide more services to their members and to the community.

The possibilities and opportunities for services are many and varied, but most will fall into one of two general categories: direct services to members, and service to the wider community.

Direct Services to Members.

- **Lectures** on topics such as "Counseling Problems of the Gifted: What Parents Can Do" during regular meetings. Local colleges and universities are often good sources of speakers, as is your state director of education for the gifted.
- **Workshops** on subjects such as "Home Activities and Projects to Help Stimulate Very Young Children" in place of, or incorporated into, your regular meetings. Some of your best session leaders may turn out to be local teachers.
- A **Newsletter** with hints for parents and teachers, items not usually found in the local papers, and a calendar of upcoming events that includes the activities of other groups (e.g., libraries, civic groups, etc.) as well as your organization's programs.
- A **State Conference** on education for the gifted—an excellent opportunity to bring in "noted" authorities, and to get people together from around the state to share ideas and experiences. State associations might consider sponsoring or co-sponsoring such a conference with local groups, organizations from other states, or groups representing other exceptionalities.

Service to the Wider Community.

- **Parent Volunteers** for the gifted program in the local schools. Most teachers are overworked, and a parent working an hour or two a week in a classroom as an aide would allow a teacher to do his or her primary job more effectively. The parent of the gifted student will be able to satisfy the need to do something "immediately" to help their child, and the sponsoring group will benefit from the better public relations with the schools.
- **Programs Provided Directly To The Schools**, or assistance in making special programs available from other sources. Pinpoint professionals and others with special skills—the topics can be as varied as dentistry and stamp collecting—and have them develop a one-hour presentation of their areas of interest. Then make teachers of the gifted and school principals aware of the programs your members are willing to provide. Many of these programs may be consistent with what they are trying to do in class. Develop a list of potential programs from other educational resources in the community, including the local arts council, area businesses and industries, and other people in your community with special abilities.
- **Establishing Your Own Program.** Many localities have gone a step further and have started their own "Saturday Morning Program for the Gifted Children" which generally consists of mini-courses on a variety of subjects. These programs typically run for several weeks in the autumn and spring and sometimes for a brief period in the summer.
- **Information and Public Relations.** Teachers, parents—members of the general public—need reliable information. What are gifted children like? What can be done to help them to develop their potential? What might happen if we don't? What are the identification standards in your state? What are your public schools required—or allowed—to do for them? Brochures and fact sheets can begin to answer these questions and to tell people where they can obtain further information. This is an especially important role for organizations in states where there is not an adequate state staff for the education of the gifted. Every parent who is made aware of his

or her child's special abilities and needs is another potential advocate for the cause—a bonus above and beyond having helped a child. Many more potential supporters can be reached effectively through the mass media.

- **Getting Involved in Issues Related to Education for the Gifted.** Organizations for the gifted, especially statewide organizations, have the responsibility to get involved in every area related to the education of the gifted. They should be involved as a concerned third party in all decisions that will affect the future of gifted children. A few of the areas in which an organization may want to consider working include:
  - — Keeping in touch with issues and providing accurate, up-to-date information to administrators, board members, legislators, etc.
  - — Being aware of the stands taken by those seeking elective office in regard to education for the gifted.
  - — Contributing to the preparation of state standards for the identification of gifted children, and for the certification of teachers of the gifted.
  - — Helping to foster the development of good courses in the psychology and education of the gifted in colleges and universities.
  - — Developing ethical standards for professionals in the area of education of the gifted.

Decison makers who are public servants need to have the very public that is influenced by their decisions looking over their shoulders, and they need relevant information from as many concerned sources as possible. If this is done constructively, responsible administrators and politicians alike will appreciate your efforts and the ultimate beneficiaries will be the gifted children in your state.

Working With Officials: How To Get Things Done

Many organizations form because their members think that the "situation is so bad that something must be done." It may be that this kind of motivation is sometimes necessary in order to get a group started. But while a perceived need might be important in justifying the organization's existence, it is at least equally important not to let the intensity of the situation produce actions that could jeopardize a favorable solution. Organizations that attempt to work *with*, rather than against the official that they are trying to influence may be more likely to be successful and more likely to promote long-term trust and good will.

When the Wake County PAGE chapter was formed it seemed to be made up of at least three groups: 1) those who wanted to take strong action right away—including picketing the local school administration building if necessary—to *demand* more teachers and programs for the gifted; 2) those who thought *something* needed to be done but who were shaken by the very idea of picketing and making demands (this group included many teachers who sincerely believed they were endangering their jobs just by coming to the meetings, but who came anyway); and 3) those in between the two extremes. Fortunately for this organization the moderates in group three far outnumbered those persons in the first two groups and, subsequently, set the direction for this organization's policies.

The approach of those in group three was fairly straightforward. They knew that more had to be done if their gifted children were to have the opportunity to develop to their potential. They also knew that the easiest way to accomplish this was to work with the system rather than against it. Changes in the program for the gifted would probably be implemented sooner and more easily if they were developed willingly by educators who were already in the administrative structure.

The key concept was cooperation. Though members of the organization knew something had to be done, they did not have either the expertise or the responsibility to determine exactly what that something had to be. The school administration had, or could get, the expertise, and they definitely had the responsibility.

The first step was to open up channels of communication—to talk to school officials, and *to listen*. Much information was exchanged in meetings with school administrators and at other times when administrators spoke at regular meetings of the organization. Members of the organization expressed their concerns, and school officials learned of the extent of interest and the depth of feeling in the community. Many school officials expressed a desire to do more for the gifted, but they also pointed out the real financial constraints under which they were operating.

In the end, the school system did propose an increase in its program for the gifted for next year, and established a study committee—which included a representative of the organization—to plan for further orderly increases in the years to come.

The organization followed up by sending representatives to every meeting at which the proposal was considered: a school board committee, full school board, county commissioners meeting. The representatives spoke up not only in support of the proposed changes in the program for the gifted, but also in support of programs for all exceptional children, and the total school package. They spoke in support of quality education for all children in the system.

In this situation, working *with* people has, over the years, led to an atmosphere of mutual respect, cooperation and trust. This does not necessarily mean that this approach will work in all situations. But considering the potential for continuing effectiveness and good will, it probably merits a good try in most situations before another course of action is attempted.

Advocacy For The Gifted In The State Legislature

Almost every year your state legislature, directly or indirectly, exerts a powerful influence on local public school programs for the gifted:

- The legislature can pass a law requiring appropriate special education for all gifted children in the state, or one that permits special services as a local option, or it can ignore the issue entirely.
- The legislature can define what a gifted child is, specify how a gifted child is to be identified, and define what "appropriate special services" are to be provided, and select the agencies to provide those services.
- The legislature can determine how much money—if any at all—will be provided for the education of the gifted, and how it will be distributed.
- The legislature may help determine whether or not teachers must have special training in order to teach gifted students.
- In each session the legislature deals with issues that may influence education for the gifted in an indirect way, such as providing schools with more school psychologists; more money for travel and smaller class size.

Obviously much is to be gained or lost depending on how well an organization works with its state legislature.

The Legislative Process, Legislators, Other Allies And Friends

Many people believe that the ways of the legislature are complex and mysterious, and that one must have a large amount of power to influence what happens there. That fairly widespread idea is somewhat misleading and only partly correct.

Certainly the path taken by a law—or an appropriation—from its inception to the time it is put into effect, can be complex, but it does not have to be mysterious. One of the best things about our legislative system is that it is really not necessary to understand all of the steps in order to use the system. The most important asset in working with the legislature is a good ally or friend, and when it comes to actually working in the legislature itself, the best allies are legislators. They generally have a good practical knowledge of the legislative process, as well as access to an

office or department that will help to research and write potential legislation. With the help of an experienced legislator, you should not have many problems understanding or using the legislative system.

The help of a good legislator is also part of the answer when it comes to the need for power—the power to influence the legislative process. In the state legislature, the power to influence can come from a variety of sources. Part of it can come from the merits of your particular cause. Advancing good arguments for meeting the needs of the gifted children in your state, and showing how proposed legislative action will help meet those needs is a source of power. One also derives power from the people whom one represents. If a relatively large number of people are affected by your cause, if they represent a wide distribution of voting districts, and *if they are reasonably well organized,* then you as their representative have power. And of course power can also come from the influence that your legislative allies are willing to use in support of your cause.

Types of Legislators. With regard to their position on education for the gifted, there are four types of legislators:

- "Type D" is against special education for the gifted. They can cause trouble.
- "Type C" is neutral. They do not hold strong views one way or the other, and they may vote either way as well.
- "Types B and A" are both for increased educational opportunities for the gifted. They will both probably vote that way when the time comes. The difference is that Type A legislators will stand up and speak for the needs of the gifted—in committee meetings, in the hallways of the legislature while buttonholing a colleague, on the floor of the House or Senate—while Type B legislators will only speak about the needs of the gifted when they are talking to a supporter of the cause. *Type A* legislators are doers who independently act on their beliefs. *Type B* legislators are nice people, and they can be helpful, but they generally will not go out of their way to work for gifted children (in many cases because most of their energy already is committed to working for other issues). Obviously one needs to find or to create as many Type A legislators as possible.

How To Get Legislative Support. There are two basic ways to find legislators who will help you. On the local level, call for an appointment with each legislator in your district. Visit them when they are "at home." Always remember that they are local people, elected by local people, and that they will be happy to talk with a constituent. Express your concerns and outline what ought to be done. *Ask for their opinion.* A week or so after the visit, drop them a brief note outlining the main points that you discussed and thanking them for the opportunity to talk with them. In the months that follow, write again asking to be kept up to date on relevant legislative action. If you are ever in the state capitol don't pass up the opportunity to drop by their legislative offices. Even if little or nothing seems to come of all of this, the time may not have been wasted. The legislators will now be aware of the interest back home, and a number of Type Cs may have been converted to Type Bs. And if you should have to contact them again—perhaps because of some sort of legislative crisis—they will remember having talked to you and that contact will be more effective because of your earlier efforts.

The second way to approach legislators is more time consuming, and probably requires that the contact be made by a representative of your organization who lives in the vicinity of the legislature. One simply goes to the legislative office building early in the session—or in the weeks prior to its start—and visits the offices of legislators. In some cases, you will need to make an appointment. In others, you might just ask to see the legislator for a moment to drop off some information. Armed with a copy of your state's current legislative directory, you might make a point of seeing:

- Legislators who have initiated or supported legislation for the gifted in the past;
- Legislators who represent your home district;
- Legislators who represent districts where your organization has members; and
- Legislators who might eventually support legislation for the gifted (for example, individuals who represent districts that include a large number of gifted children).

Be sensitive to the time constraints under which these individuals operate. Be prepared to be brief. You can always make an appointment later to talk for a longer period of time. Give them a short written outline of the main concerns early in the conversation, and make certain that it has your name, address and telephone number on it.

Most important, "open up" and be honest. Tell them about gifted children, about what other states are doing, and about what your organization would like your state to do. If a "friend" in the legislature is needed tell them that too—and ask for their help. You will meet a number of people in and around the legislature in this way. If you are truly fortunate, you may help some real friends of gifted children to emerge.

Other Important Allies. Legislators are not your only potential allies in working for legislative change. If the governor and/or lieutenant governor are supportive, that can be a help; if they are actively supportive, that is even better. Visit them and ask. Officials of your state board of education and of your department of education can also be very helpful—usually by furnishing a view of the administration's perspective on the education of exceptional children. They are almost always supportive.

Two of your most important groups of potential allies have not yet been mentioned. They are:

- Representatives of organizations advocating the interests of other special children
- Parents, teachers, and associations back home that are primarily interested in local issues concerning the gifted—not state issues.

Some advocacy organizations serving "other exceptional individuals" (the retarded, the learning disabled, etc.) have worked with the legislature for a long time. They have amassed valuable experience doing something very similar to what you are trying to do, and they have contacts and allies that could be very helpful. If you can gain the help and support of the individuals representing these groups, it might be a major accomplishment. But that may not be easy. Some people in these organizations may respond bitterly to the very idea of gifted children receiving special attention. And in some states where different categories of exceptional children compete for funds, friendly cooperation may be almost impossible.

But that is not always the case. In North Carolina gifted children are considered exceptional children, and services for all exceptional children are funded out of the same budget. Organizations representing exceptional children in North Carolina have a loose working relationship—and all of us work for the total budget. In fact, a few years ago when the legislature proposed a supplemental budget with money for handicapped exceptional children—none of which could be spent on the gifted—*all* of the organizations decided to fight that budget, even though it meant proportionally less money for the other categories if the gifted were to be included. The rationale behind this decision was simple: *Working together, proponents of special education for all exceptional children can do more than proponents for individual categories of exceptional children can do separately*—especially if they must compete with each other. If the legislature excluded one category this time, which category might they exclude next time? In the end, gifted children were added to this budget, and the total amount funded was increased by more than 25 percent.

A "War Story."

This same legislative battle can be used to illustrate the value of another important potential group of allies: the people back home. A large number of individuals who are deeply and sincerely interested in the welfare of gifted children in their own community may choose not to get involved in state issues. If there is a local association for the gifted in their area, they may join. They may even attend the annual state conference on the gifted—if it is not too far away. But beyond that level of involvement they show little interest. You might even think that they don't care. But you might also be wrong.

When the supplemental budget that excluded gifted children was proposed, representatives of organizations for the gifted who were working with the legislature were placed in a difficult position. On one hand, since gifted children were at the center of the issue in question, organizations for the gifted were expected to contribute greatly to the fight to get that budget changed. On the other hand, it seemed that the two or three organizations for the gifted that were initially involved were in a weak position, and could contribute only a little influence where it would really help. About 40 legislators and the Governor were considered to be most important in determining the fate of that budget. The representative of the state association could talk to most of these people, but what power to influence would he have? He could argue "merits"—that the budget was unfair—and he could argue "numbers"—that it would affect a fairly large number of people. But since the state organization did not have a very large membership at that time, and since the legislative districts in which the members resided were not known to him, he could not even say with confidence that a single voter in each legislator's home district was concerned. The representatives of the other organizations for the gifted were in weaker positions: Because these organizations were local in nature, their representatives could not even be said to represent any constituency beyond their home counties. Voter interest from large portions of the state was left in doubt. And legislators from many districts—mostly rural—were openly skeptical about interest in the matter back home.

This was when the phone calls started. With the help of a legislative directory and a map of the state, the home districts of all 40 of the legislators in question were pinpointed, and the cities and towns within their boundaries were noted. Then the map was compared with: 1) the address list of members of the state association; 2) the locations of all of the local organizations for the gifted; 3) a list of the names and addresses of all people who had attended the state conference on the gifted in the last two years; and 4) the names and addresses of all teachers of the gifted, college professors, etc., who were not on the first three lists.

Two people from each legislative district were identified and then called. The situation was explained to them, and they were asked to help. If they agreed, they were given a brief but accurate outline of the specifics; the names, addresses and home and office telephone numbers of key legislators in their areas, and a telephone number to call for more information. They were also asked to contact not more than three other concerned people in their area to solicit their help.

The response was overwhelming. Not one person who was called declined to participate. And from the next day on, legislators in the capitol started commenting on the extraordinary degree of interest in the gifted being expressed in their home districts. One legislator even said he had received more calls about gifted children being left out of the budget than about any other matter on the agenda, and that he "didn't even know that there were any gifted children back home!"

Of course, other things were being done as well—a television news conference, a meeting with the Governor, testimony before the Joint Legislative Appropriations Committee—and so it was difficult to determine just what was primarily responsible for the ultimate victory.

One thing is certain. A large number of people who had never before participated in a statewide effort for the gifted did so this time, when they were most needed. They helped win the "Battle of the Budget—1978." It might be that such reserves of largely untapped support are present in your state as well. With initiative, organization, and effort, getting involved in advocacy in your state legislature may work for you too.

Knowing What You Want and Getting It

Robert Siewert

Fundamental Elements of Support

The traditional path for advocates is to generate policies, such as legislation, rules and regulations and/or a state plan, and to secure adequate funding for those policies. The advocates usually spend some time deciding what it is they want to go in the policies. Then they work together to get those policies adopted by the legislature, state board of education and/or the state department of education.

Oftentimes, however, what appears to be a straightforward task of getting support for policy gets sidetracked or, worse yet, lost in the many formal and informal steps of the policy making process. Those who wish to get more for talented and gifted programs must first understand the two fundamental elements of support for any program—policy and funding, or appropriations, and how those elements are established in a state.

Policy

Policy dictates the "who, how, what and why" of a program. State policy most often includes the following:

- Why the state feels that gifted and talented children need educational opportunities beyond those offered in the regular classroom.
- Who will be defined as gifted and/or talented? How will they be identified?
- What are the instructional goals for the programs? What types of services are to be provided?
- What standards will the state set regarding the programs?
- Will the state mandate that the local district provide programs for the gifted and talented or will the state leave that decision to district policy makers?
- How will the state distribute state funds to local districts and other agencies to provide programs for the gifted and talented, and what will the districts and agencies be allowed to do with those funds?

Several decision makers are involved in drafting, reviewing and approving the different layers of policy.

Statutes or laws, which originate from legislation adopted by the state legislature, usually are general in nature. The statutes set the direction of a program and establish the broad parameters for its administration.

Administrative rules and regulations are also part of state policy. In most states, rules and regulations are usually drafted by staff in the state department of education and adopted by the state board of education. In many states, rules and regulations have the force of a law. The rules and regulations provide the mechanics for program implementation, such as a detailed definition of students, with identification and selection criteria; standards for programs; and criteria for approving a program for funding. The rules and regulations will also specify how funds are to be distributed under the legislature's general policy guidelines.

Guidelines are developed by program specialists in the department of education to provide more detailed information on identification procedures, program standards, and how to secure funding from the state.

Appropriations

The actual funding provided by the state legislature to carry out the state's policy for gifted and talented education is called the "appropriation." The appropriation is different from an "authorization," which is also set by the state legislature. The authorization is the limit on the monies that can be spent on a program; the appropriation is what the program actually receives to fund its activities.

The appropriation of funds is the final act in a long sequence of events. The first act is the formulation of a budget within the state department of education, which is followed by a review and the approval of that budget by the state board of

education. The governor's budget staff is also likely to be involved in the formulation phase and is responsible for submitting the final education budget, along with the other components of the state's budget proposal, to the state legislature. Most state legislatures also have a lengthy and complex system for reviewing the governor's proposed budget, for developing additional budgets of their own, and for pulling together and enacting the final state budget for education and for all other programs.

Establishing State Statutory Policy—The Legislative Process

Ideally, policy and appropriation legislation should be developed in tandem. Unfortunately, the realities of the legislative process usually separate development of these two fundamental program elements.

Chart A shows the typical movement of policy and appropriations legislation as they follow separate paths through the process.

Chart A

Policy (what)

1. Developed and proposed by:
   - State Board of Education
   - Legislative Subcommittees
   - Advocate Groups
   - Others

   and referred to committee for hearings and recommendations.
2. House Senate education committees review, hold hearings and recommend.
3. Other committees may request or be referred the bill for hearings and recommendations.
4. The bill is presented to the floor of both houses for a vote.

Appropriations (how much)

1. The state department and the state board of education develop a proposed budget for education.
2. The governor's office reviews the budget and modifies and/or incorporates it into the state budget recommendation to the legislature.
3. The state budget is introduced and referred to ways and means committee(s). Usually a subcommittee on education holds hearings and recommendations on education portions of the state budget.
4. Other committees may request or be referred portions of the budget for hearings and recommendations.
5. The state education budget bill is referred to the floor of both houses for a vote.

As the chart illustrates, policy and appropriation bills may never be heard by and acted upon by the same legislative committees, and amendments may be made to either or both bills at *any* step along the way. It behooves the advocates of these bills, then, to continually monitor the progress of both bills and to be sure that amendments to either do not create problems when the two come back together after passage.

Key Actors

There are many persons who are considered key actors because they have direct responsibility for bills, can influence their working and can determine whether or not the bills will survive the many steps of passage. Advocates must establish contact with these persons and communicate with them regularly. Advocates must also be seen as credible by these key actors so that their recommendations and suggestions will be listened to and seriously considered.

Chart B outlines the key people who should be contacted for each of the steps outlined in Chart A.

Chart B

Policy	Appropriations
1. State department staff charged with preparing bills or making recommendations on bill introduced by others State board members, who will either approve department-prepared bills or testify on bills proposed by others 2. Education committee chairpersons and members and, of particular importance, the staff for the committees 3. The chairpersons, members and staff of any other committees to which the bill is referred 4. All legislators, since they will ultimately vote on the passage of the bill on the floor	1. The State Board of Education which prepares the budget 2. The governor's office, which modifies and approves the Department budget for presentation to the legislature; of particular importance is the governor's fiscal analyst, who is charged with responsibility to work out budget details. 3. The ways and means committee chairperson and members and, of particular importance, the legislative fiscal analysts who act as staff to the ways and means subcommittees 4. The chairpersons, members and staff of any other committees to which the bill is referred 5. All legislators, since they will ultimately vote on the passage of the appropriation on the floor

As is noted on Chart B, legislative staff are very important people. They are responsible for gathering information for the legislators, preparing reports and position statements, and following bills so that the legislators can keep informed. Committee staff function in the same capacity. So staff members for an education or appropriations committee, and staff to key legislators on those committees should also be contacted early in the process. Their help can be key in keeping gifted and talented education legislation from getting lost in the many work sessions, hearings and floor votes on the hundreds of other bills before the legislature.

When Decisions Are Made

Many "what" and "how much" decisions are made far in advance of a legislative session. Policy proposals are generated six to nine months prior to the start of a session. Budgets are prepared by the Department and approved by the governor's office three to nine months before a session. Advocates can have a substantial impact on decision making during this preparation time. Both appropriations and policy can be written as compatible parts of the whole. There is usually time to rework and edit bill language.

As the legislative session progresses, advocates have less and less influence on bills. Decisions made during a session are made under extreme time pressures. Amendments are proposed to incorporate new testimony, or to mold a compromise among varying points of view, or to fit the bills into existing constraints such as limited revenues. During the height of the session, advocates often must accept the changes in wording of the bills or else be able to quickly propose different wording that still will be acceptable to the sponsors of the bill and to other legislators.

In general, the time to influence decisions is while they are made. Once the bill is written or amended there is usually little advocates can do except push for the bill as it has evolved, or risk ending up with no bill at all.

Keeping The Loose Ends Tied Together

As was pointed out earlier, policy and appropriation proposals may never be considered together again after the initial preparation. It is therefore in the best interests of those promoting the legislation to keep close track of both bills as they move through the legislative process. The several people who have responsibility for keeping track, i.e., the department of education, state board and legislative staff must be communicated with constantly. But in many cases, the advocates must do the "bird-dogging" as well. Here are some pointers for keeping up with loose ends.

- Participate in the development of the proposals and learn the reasons for the approaches the policy makers have taken.
- As the session commences, call the legislature, or better yet, get the legislature's daily and weekly agendas, to see where the bills have been and are going.
- Go to every hearing and work session on the bills. Be available to provide informed testimony in support of the bills.
- As amendments are proposed and adopted, consider what effects they will have on the original intent of the legislation, and communicate this through testimony and to the legislative staff. Further amendments may be needed to maintain compatibility with the original intent, so find out how this is done and be prepared to draft actual wording for amendments.
- Constantly communicate among your fellow advocates. Meetings, telephone calls, and memoranda will keep everyone aware and ready to respond.

Don't reply solely upon "gifted and talented" people. To be successful, the bill must enjoy broadbased support. Seek support from administrator organizations, school board organizations, teacher organizations, and parent organizations. The more support, the more likely the success of the legislation. Establish a legislative liaison group within your organization months before the legislative session starts and develop strategies for monitoring the bills' progress.

Establishing State Rules, Regulations And Guidelines

The enactment of state statutes is a major achievement. But it is only the beginning of a decision making process that will determine the actual shape of a program. Advocates should also seek to influence the development of administrative rules and regulations, as well as program guidelines, because these additional policy levels will affect the shape and perhaps even the existence of local programs.

The development and revision of administrative rules and program guidelines are ongoing processes. Changes can be made at any time. Changes in the guidelines can be initiated by contacting the specialist or director for gifted and talented programs within the state department of education, and/or by communications with the state advisory committee on gifted and talented education. Recommendations for changes in administrative rules may be proposed to the State Board of Education or state superintendent/commissioner. There will be a formal procedure of changing rules and regulations which you will have to follow. The process usually involves the Board reading drafts of proposed changes, listening to testimony, and revising the proposed changes before final adoption.

The same principals for influencing legislation apply to administrative rules and regulations:

- Contact key persons early and communicate with them regularly.
- Follow the process closely so that you can influence decisions as they are being made.

Oregon's Experience With The Legislative Process

Oregon's policies and appropriations have undergone a unique process. Our experience provides a tale of caution to those advocates who believe that all a program needs is money. Funds are important, but basic policies to shape a program are crucial.

The history of Oregon's talented and gifted program dates to the early 1950's when the legislature enacted policy and appropriation legislation. Funding ended in 1967 after three separate appropriations, a major change in the original act's language, and after 70 districts cycled through the three year process. After legislative appropriations terminated, the language remained inactive in the state statutes for several years. No requests for funds were made by the Oregon Department of Education or by any other group.

Ten years later, renewed advocacy efforts were made for gifted and talented program funds. New policy was proposed early in the 1977 session by advocate groups, but did not move past the second committee hearings.

Although no appropriation for gifted and talented education had been included in the 1977 state department budget, several legislators interested in gifted education who were responding to advocate efforts succeeded in finding funds and in writing an amendment to the Department of Education's appropriation bill the day before the session ended. The amendment stated that one million dollars was available for school district grants at $225 per identified student, regardless of existing statutes. So although funds were made available, the legislation prohibited locals from using existing policy to administer them, and neglected to earmark or appropriate funds for training, curriculum planning, or other activities that help districts develop programs.

The result was an administrative nightmare. A large appropriation had to be distributed to local districts quickly without policy to guide "the who, how or what" of programs. To make matters worse, few districts had been operating gifted and talented programs since the termination of state funding 10 years before. So most districts had little or no knowledge of how to establish a gifted program even if they had the funds to do so.

The Oregon Department of Education moved quickly to find and hire a state specialist for gifted and talented education and to begin setting policy for the distribution of the one million dollars.

The rulemaking process at the state board level became the primary policy-setting avenue. The policies were developed through several steps.

- A task force with representation from a wide variety of groups was selected, with the assistance of NASBE, to describe the ideal statewide program for gifted and talented. The task force's position paper, which included an open-ended timetable, spelled out the responsibilities of the state and the local schools and described specific activities.
- The statewide advisory committee reviewed the position paper, and model rules were drafted.
- The model rules were presented to the state board for review. At the same time, districts were asked to review the rules and make recommendations, and formal lobby groups such as the state education association, administrators' organizations, P.T.A., school boards association, and others were sent copies and their recommendations solicited. The several meetings with these groups proved to be invaluable in amending the rules and winning support.
- Six state board meetings and a public hearing were held to gather further testimony before the rules were adopted by the board in May.

Advocates, other lobby groups and the department of education then began writing a proposal for statutes they could present at the next legislative session, which would reflect the policy approved by the state board. This process followed closely the one for proposing the rules, and included a task force to review and draft model statutes, reviews by the state advisory committee, meetings with other

lobby groups to revise the proposal and elicit support, and final presentation to the state board for inclusion in its legislative package.

The budget proposal was developed along the same lines as the program policy. The task force position paper described, in effect, the long range goals of the program, including cost. Amounts for each of the activities were specified and a total budget figure established by the state advisory committee, the department and the state board. The budget for the program was included in the department budget and submitted to the governor's office.

During the following session in 1979, policy was incorporated in a bill passed by the legislature with only two dissenting votes. Appropriations, however, were a different matter. Reduction in state spending was a major issue of the 1979 legislature. Budgets for programs were reduced, and in some cases severely. The gifted and talented program was reduced in the governor's budget, and the legislature did not reinstate the funds. However, some hope of reinstatement was held out to the last few days of the session and a large lobby effort was maintained to the end.

Learning From Oregon's Experience

Oregon advocates have realized that it is of utmost importance for advocates to be in touch with current influences on education policy and funding. A "rose colored glasses" or "blinders" approach to gifted and talented education prevents advocates from viewing this program as one of many in education which is affected by changes in other phases of government and public attitudes. When advocates harbor expectations which are unrealistic given current circumstances, then they will appear to policy makers to be narrow-minded and out of touch with reality.

Among the realities advocates should consider are the following:

- For every action there is an equal and opposite reaction. As talented and gifted education gains policy and financial status, counter reactions will become stronger and more subtle. Advocates must work to maintain support for what they have achieved while building support for expansion.
- The process used to write policies is very important and broad-based participation is imperative. More input, from as many sources as possible, within and outside of the advocacy group, will result in a plan with broad-based support. Broad-based participation, however, will require compromise. There will be many differing views of what "right" policy should be. These differences must be resolved through meetings prior to a legislative session. Conflicting opinions should *not* be aired by advocates in testimony before the state board or a legislative committee.
- Take nothing for granted. Nothing is assured until both policy and appropriation bills receive a majority vote on the floors of both houses. Don't rest until this is accomplished.
- The "best-laid plans . . ." also applies to advocacy efforts. Be ready for unforeseen events or shifts in the political winds. Involving as many people, groups and lobbies as possible in the writing of the policy and appropriation bills helps to anticipate—if not forestall—future problems. But no amount of advocacy planning will allay hidden agendas, staunch resistance or sudden, unpredictable events.
- "Be careful of what you want, because you may get it!" This message is of ultimate importance to advocates. Carefully consider the repercussions and results of what you propose. "We just need money" thinking may lead to endless problems as it has in Oregon. Throwing a bucket of money at a problem has never worked in education. Those who advocate this approach lose credibility and effectiveness with decision makers.
- Mandates or specific program requirements without money will cause rebellion when districts attempt to accomplish the impossible with available resources. These attitudes can kill a program.

- Don't promise something you can't deliver. Grand claims that the gifted and talented programs will solve the woes of public education (i.e., mediocre curriculum, dropouts, low SAT scores, etc.) sound good—but are hard to deliver. Past promises have a tendency to sneak up on advocacy efforts at the worst possible moments—during important testimony before a ways and means committee considering third or fourth year funding, for example. You may think a legislative committee has a short memory for such things, but you will find that legislative staff and opposing lobby groups have long memories. Credibility, the key to effective advocacy, can be lost quickly when advocates are confronted with past errors in judgment, naive claims, or grand promises.
- Advocates need to state the benefits of a program in terms of what can be clearly demonstrated. These may be couched in a variety of ways including student growth, curriculum improvements, and teachers trained. A program may be sold philosophically on grand claims, but must be backed up with reasonable goals and clearly defined results.
- Don't just attempt to avoid jargon—do it!
- In organizing for lobbying, identify key actors and make efforts to contact them consistently.

Advocates for the gifted and talented will continue to compete with other educational programs for inadequate and often dwindling dollars. However, they must also join *with* advocates for these education programs to avoid losing funds to other state agencies. So don't approach advocacy for the gifted and talented with blinders on. Work hard to establish a sound base of credibility with policymakers, and you will find that gifted and talented programs will prosper.

Advocating for Long-Lasting Change

Patricia O'Connell

Despite rigorous and varied attempts by many groups to change the quality of life in the classroom, there have been few substantial and long-lasting changes in the way we educate our children. As a result, advocacy for gifted and talented programs is greatly affected, as are all other aspects of our public school programs.

In our zeal to develop gifted programs, we often are myopic. Only when we understand the process of change will we be able to establish effective, on-going services for gifted children.

Advocacy is the process by which change occurs. It is an organized effort to promote a specific idea or goal. In a school setting, advocacy usually results from the identification of a weakness in the educational program—a weakness around which a group may rally. The group defines and articulates the problem, then follows a standard procedure for airing its concerns. If advocacy is the process, then change is the product. The product affects children and is visible to the community at large.

Most efforts break down in the transition between the idea being advocated and the program for change. Many education advocacy groups make predictable mistakes because of confusion over what they are attempting to do. By identifying and avoiding some of these common errors, advocates for the gifted and talented may be able to succeed at creating long-lasting programs which genuinely change the quality of life in the classroom.

Schools Are Not Simple

In our democracy, schools serve, and are financially supported by, all of our citizens. No one is neutral when considering the state of public education. Schools encompass a complex set of relationships which define the ways various groups in the institution respond to each other. The superintendent has a predictable relationship with the local school board; the teacher has a predictable relationship with the principal; the principal has a predictable relationship with a parent. These relationships are defined by the role each has to play in the school's functioning, and combine to create an intricate, complex institution. They must be predictable and consistent in order for the schools to run smoothly.

The goals of the schools are likewise complex. Schools have never simply taught children to read and write. In the 1700s, the New England Puritans equated education with religious instruction. In the 1800s, Horace Mann believed the purpose of public education was to create the possibility of upward mobility for all citizens. Today, schools are used as a vehicle for social change because other institutions have failed.

To prepare students for the world of work, we have Career Education; to accommodate children who are economically or socially disadvantaged, we have Title I; to prevent teenage pregnancies, we have sex or health education; to feed children who come to school hungry, we have the School Breakfast and Lunch Program; to instruct children who do not speak English, we have bilingual education. The list goes on and on. Most of these programs, which require tremendous time and energy for schools to operate, are responses to societal problems. Together, they produce a complex set of goals to be fulfilled by the public school. Each of these goals has an advocacy base, each of which pushes the schools to serve children better.

The relationships among those involved with the schools are complex and the overall goals of the institution are many. When an advocacy group enters the picture it usually wishes to affect some aspect of the structure. Unfortunately, these groups often do not understand the overall functioning of the schools. As a result, they limit their effectiveness and diminish the possibility of success.

Roles Must Be Understood

It is crucial to have a grasp of the general functioning of the school in order to make significant and long-lasting changes. There are three areas in which mistakes are frequently made by advocates—mistakes which are a consequence of failure to understand the full purpose of public school.

"The Principal just doesn't care about children," says the advocate. Or, "The School Board was influenced by Ms. Smith. She is interested only in making sure her pet project, girls' sports, is supported. She doesn't care about education."

When advocates encounter resistance to their ideas, they always assume that those raising the questions are either anti-progress or anti-education. The person who does not accept the advocate's idea is invariably labeled a "Bad Person." Rather than look at the position of the resistant person in relation to the whole school, advocates attribute the resistance to personality. This is a useless and often misleading defense. Most people within the school respond to new ideas based on the overall situation in the school and their positions and responsibilities within that structure. Rarely are they involved in ideological resistance to advocates.

For example, a teacher who also chaired the school's gifted and talented program requested a release day to visit another school with a gifted program she felt could serve as a model for her school. The principal denied the request. The teacher submitted the request again with additional, extensive justifications. The third time she submitted the request, it was approved. The experience left her with bitter feelings toward the principal. She assumed he had based his resistance on a rejection of gifted education and that he would not support any program recommendation she and her committee developed for the following year. She felt he was a difficult and bureaucratic individual who opposed innovation. In reality, however, the principal was not opposed to what she was trying to do. Rather, he was under severe budgetary restrictions because a serious flu epidemic at the beginning of the year had resulted in an unusually high substitute teacher payroll. He had some funds, but not enough to support all of the requests he faced. Therefore, he required the staff to submit requests four or five times to be sure they were not frivolous. He was not making programmatic decisions; he was acting in his role as an administrator.

The aggrieved teacher/advocate in this case approached the principal in a defensive way and avoided contact as much as possible, an approach which aggravated the situation. Because the principal subsequently was left out of discussions about the proposed program, he became suspicious. They finished the proposal and took it to the superintendent first, circumventing the principal. The superintendent then called in the principal and asked him if he was familiar with the proposal, which of course he was not. This did not look good to the superintendent, and put the principal in a defensive position. Needless to say, the proposal had a difficult time.

The group of advocates made a fundamental mistake. They assumed the principal was a roadblock to their proposal, based on their assumption of what he was like as a person. Although budgeting constraints forced him to weigh their needs against other needs in the school, they simply assumed he was opposed to change. As a result, the advocates further aggravated the situation by avoiding him.

The lesson is clear: when approaching someone for support, be certain to understand his or her job and the accompanying pressures. Schools have a cohesive chain of command, and various individuals within the organization will most often react to an advocate based on their position rather than on their ideology. Further, when encountering resistance, do not circumvent the person. Instead, inform and include him or her. It can only enhance the program, and will help prevent problems in the future. As this teacher learned too late, the principal was not opposed to programs for the gifted; he just had a problem with substitute time.

Change Cannot Take Place In A Vacuum

A second common mistake is the assumption that change somehow will take place in a vacuum. Advocates often believe that a school can change one part of its instructional program without affecting the whole system. By failing to anticipate what some of these changes might be, advocates often defeat themselves. This is a crucial part of the transition from a good idea to an actual program.

In one school system a few years ago, a group of fairly influential parents promoted services for gifted children. They proposed that the school system screen and identify academically gifted students by using grades and test scores, and place them in a self-contained program in an extra classroom in a new school. The plan was accepted, all new materials were purchased, and a new teacher was hired. Students had to be transported from all over the district to the new school. Because no buses covered the city and went to this neighborhood school, it was decided that the school system would pay for taxis to pick up and drop off the selected children each day. One can imagine community reaction.

The teachers resented the new materials; they resented losing their best students; and they resented the assumption that they were totally incapable of educating these children. The community was up in arms over the taxi service, and the commonly held view of gifted education as an elitist program prevailed. Furthermore, few of the children in the program were poor—despite the existence of a significant poor population in the district—because identification was based on test scores alone. Needless to say, the program was singularly unsuccessful. It will be a long time before this community will consider programs for the gifted again.

This advocate group did not think through how their program would be viewed by the staff and by the community. The taxi service may have been cost-effective, but it certainly was not good politics. In addition, removing the brightest students from their regular classroom all day had a detrimental effect on the composition of other classrooms.

This experience illustrates that although some consequences of change are unpredictable, many can be anticipated if proposed programs are adequately thought out beforehand.

There Are No Simple Solutions

Many problems identified by advocate groups resist solution. We identify areas of concern through the symptoms of a problem rather than through a careful examination of the problem itself. Catchy and slick solutions often are formulated to address fundamental problems. The Basic Skills movement is a recent example of this. A symptom of the problem is the decline of test scores on college entrance exams. The solution supported by many is elimination of so-called frills and a return to the Basics. The Basics are somehow identified with cleanliness, thrift, and morality, as well as with academic subjects. Doing away with English electives and math games has not improved the test scores of students.

Many other factors are involved. For example, more people than ever before are taking college entrance exams, thus changing the population sample. Likewise, television and minicomputers have reduced the reading and math used by society in general, affecting the students. A better question might be whether the tests themselves adequately reflect knowledge that is required today. Even when the elective course system is examined, one wonders whether *it* is the problem or whether the way it is *implemented* is the problem. Are teachers prepared to switch from Chaucer to 20th century Science Fiction? Are teachers making electives less rigorous because they view them as fun—as a frill? Electives were devised to be more interesting, not easier. These and others are all simply part of the fundamental problem: the decline of standards. This problem has not been resolved by doing away with movies, plays, the arts and recess. By singling out one aspect of the situation, one denies the variety of factors that contribute to any major problem.

In the gifted and talented education movement, we have been guilty of trying to simplify problems. In the late 1950s, Sputnik launched a push for accelerated science and math programs. These programs were viewed both as a response to a national crisis and as a key to the future of gifted education. Unfortunately, they only served the needs of a small portion of the gifted population. They were not appropriate for those interested in literature, history, the arts, or for children from poor families. Most of the programs were located in middle-class communities. The solution did not adequately address the fundamental problem, that exceptional children have different interests and special learning needs.

Today, school districts are looking for simple programs to meet the educational needs of a complex population. School districts have adopted programs in toto simply because they worked in another state. For example, the school staff of a rural community in Maine decided to develop a gifted program after urging from a group of parents. They cast about for a model and came upon the Renzulli Enrichment Triad. It seemed simple and understandable to them. However, it proved difficult to implement successfully. In this rural area, many of the children came from poor, culturally deprived families. Many of the children in middle school and high school had motivation problems and serious learning weaknesses, despite their gifts. Many had turned off to school long ago and were seriously underachieving. The Enrichment Triad does not work well with such children. Another problem was that this area lacked the community resources on which the Triad also depends. Most importantly, the teachers did not have the wide experience required by the Triad for proper student guidance. Many of the teachers had grown up in the area and had not traveled much, and their world was as limited as that of the students. In addition, many students needed individual work in skill areas and guidance in their attitudes. The teachers required much more support and many more materials than were available in the community. In this situation, the simple and straightforward Enrichment Triad did not address the complex needs of the school and the community.

It is easy to be seduced into believing that straightforward, simple solutions will solve problems. However, in the real world, many factors combine to create a problem, and a simple solution rarely solves it. The one overriding principle to be learned is this: *Always consider the whole picture.* Reducing and simplifying a problem will never lead to an adequate solution.

Making Your Efforts Successful

1. Listen

You inevitably will encounter resistance to your problem from someone. The only way you can influence them is to listen carefully to their objections. Our first reaction when we meet people who oppose what we are promoting is to lump them with "the opposition," and to stop listening. This is counter-productive. From that person's point of view, there are very real reasons for disagreeing with you. We must listen carefully because often the apparent reasons for disagreement are not the fundamental reasons. By listening carefully to the other person's view, and by reading between the lines, you will be able to formulate your response. You then can collect the appropriate information which responds to their objections. If this is done in a reasonable way, either they will be persuaded or they will be neutralized in the debate. At the very least, they will feel that their objections were considered and that you had the courtesy to take them seriously.

2. Understand Thoroughly The Way Things Are

It is said that knowledge is power. This is certainly true for advocates. Make a study of the way your school operates, how decisions are made, and who is influential. Decisions are made in both formal and informal ways in most schools, and the information channels are often as important as the formal ones. For exam-

ple, is the third grade teacher, who is also the wife of the superintendent, an important person to contact? You constantly must use this knowledge when charting an advocacy effort.

3. Don't Be Territorial

Support all that is good about the school and education in general. Broaden your activities so that you won't be viewed as a single-issue person. If another group is promoting a music program for all children, support its efforts. Although the program may not specifically affect the gifted student, it will improve the overall quality of the school. Your support will show that your group is interested not only in your own cause but also in helping other children. In return, you can hope that others will support your efforts.

4. Study Other Successful Advocacy Efforts

Discover how others in your community approached their problem and how they proceeded. Find out what problems they had and how they resolved them. Many advocacy groups feel that by identifying their own problems well, they will prevail. While this is important, you must also understand that advocacy is a process which has a correct and incorrect approach, irrespective of the particular cause being advocated.

5. Be a Supporter Of The School

No matter how frustrated you are with a particular school, something is always being accomplished which you can support. Let the school know. Principals and teachers almost always hear about problems and complaints; when things are going well in a certain area, they should hear about that too. This may mean helping the school with a library drive, or commending the principal on a smoothly run lunch program. This will help alleviate the shrill image advocates often have and will smooth your path for the day when you propose a change.

6. Don't Ignore Anyone

If you encounter opposition, don't ignore it. You may never persuade them, but you should give them every opportunity to see your point of view. The majority may rule in deciding whether a program should be implemented, but a minority can make it fail once the program is operating. This happens frequently. A school board member opposes a program which is implemented by the other members. Because of the member's initial opposition, he/she was not included in any of the planning and implementation of the program. The dissenting member misrepresents the program to the community. The opponent may never change his or her views, but this should not be the result of a lack of information.

7. Define What You Really Want

Advocates are good at deciding what the problem is, but not always good at agreeing on the solution. Before you propose a solution, be sure it is carefully thought out and takes into account the variety of factors that are likely to affect its success or failure.

The Challenges Ahead for Gifted and Talented Education

Wesley Apker

While the mission of gifted advocates of the 60's and 70's was gaining recognition for their cause and implementing new programs, their challenge in the 80's and 90's will be sustaining that hard-won momentum.

The next several decades promise a continuation of rapid societal and technological changes that will make the United States and the world a very different place in which to live and educate our children.

The Framework: Social And Technological Changes

We are already well on our way to becoming a society with an overall lowered birth rate. Many more women are in the work force than ever before. Soon more than half of them will hold paid jobs. So-called "minority" groups—Hispanics, Blacks, and Asiatics—will make up a much larger percentage of the population, and our "youth culture" will convert to an older, greying society where there will be more people over age 50 by 1995 than there are school-age children.

Growing scarcity of basic resources such as land, food, water, clear air and energy already is making regions of the United States more dependent upon each other and the United States more dependent on other parts of the world.

Technology and communications are revolutionizing the way we live, the way we work, how we see ourselves and each other, and how the rest of the world sees us. As we become increasingly aware of the inevitable limitations on our lifestyle, the third world nations are just awakening to the possibilities for a better life and are demanding their fair share. More and more people will be competing for less and less, both in the United States and around the world.

Add to this already complicated equation a major shift of emphasis within our own government from federal to state and local control, from categorical to block grants, and you have a result that will cause significant changes for American education.

Increasingly, education programs will compete for funds with the human and social services required by an older society. Bilingual education will become more important. The teaching and learning process will increase the use of interactive computers and television programs and will reduce its dependence upon the school building as the focus for all learning. At the same time, a new group of "educators" —community-based organizations, proprietary schools, business and industry—will join the schools in playing a more active role in better preparing young people for the transition from school to work, and for adult careers.

Business and industry will become much more concerned about worker welfare, learning and leisure. Child care services will be greatly expanded. Adult retraining will be required several times during a lifetime. Lifelong learning will become both a necessity and a form of entertainment. It will also become less dependent upon individual teachers and more dependent upon pre-packaged interactive computer and television programs.

The Challenge: Potential Changes In Politics, Funding

The major dilemma and challenge for gifted advocates is this: In an era of great change when the need for exceptional leadership will be great, the traditional mechanism for gifted funding, the categorical program, will be in trouble.

Congress has decided to allocate funds for gifted and talented and approximately 30 other elementary and secondary education programs into a single state grant. In the meantime sentiment is growing among governors, legislators, local school board members, county and municipal leaders and others for distributing state funds through block grants. This approach runs counter to the views of advocacy groups who want categorical programs with considerable regulatory specificity.

In states such as California, tax initiatives have transferred full funding responsibility for education to the state, and also have placed firm limits on spending

growth. In that state and others, political and educational leaders are also having second thoughts about allocation formulas which distribute most of their funds through categorical programs in favor of general funding. To assure program quality, mandatory building and district level planning processes would be necessary. The planning processes would also have to be coupled with systems for oversight, accountability, and technical assistance.

With federal block grants a reality and state block grants a possibility one thing is very clear: that gifted and talented advocates must begin now to develop multiple strategies to ensure continued support for gifted and talented programs.

Federal Level

With the abolition of almost all categorical programs, reduced federal regulation, and the awarding of the block grant to state education agencies the focus of attention will shift dramatically to the state and local levels. State and local education agencies will be developing state and local plans to address planning, oversight and appeal processes, parent involvement, and the question of populations to be served. Advocate groups should move quickly—if they are to have some input into any general guidelines the federal and state governments draw up for these purposes.

State Level

As states are to be given more flexibility in the use of federal funds, gifted and talented leaders must focus considerable attention on those who will develop the process for state plan development and who will eventually develop the state plan. Advocates should seek to insure that their views and the needs of the gifted and talented are made known during this process. They will also want to be sure that the state and local objectives match the needs of the gifted population. Another key part of the state strategy will be to guarantee good visibility with the governor, the legislature, the chief state school officer, and the state board of quality gifted programs. The latter could take a variety of forms, including the governor's gifted summer program, a legislative mentor program, or a chief state school officer and state board student scholar program.

Local Level

In an era of increased general aid and spending limits, there will be more local discretion at the district and building level, but there will also be fierce competition for the available resources. Gifted and talented advocates not only will need to build coalitions with others; but they will also need to help others reach their goals in ways that allow gifted children to be well served.

Challenge As Opportunity

If gifted and talented programs are to survive, their advocates at the local level must be prepared to recognize and exploit the many rapid changes the next few decades will bring. Gifted and talented advocates must build powerful alliances with the elderly and the business and industrial communities. They should aid and encourage the use of in-school and out-of-school mentors and released-time programs which place gifted youngsters in community or business and industry settings. They should support programs which increase teacher familiarity with new teaching and learning styles; with techniques that promote use of interactive computer/video gaming and simulation; and with innovations that generally enrich the gifted and talented child's educational experience.

There are always risks, of course, with bold new strategies. But there is, I think, a greater possibility for success. The next decade will be a decade of uncertainty and change. In my view it is a decade designed for those who would use bold, creative and systematic strategies—and who would use them successfully.

About the Authors

Lyn Aubrecht received his Ph.D. in Experimental Psychology from Ohio State University in 1974. He is currently an Associate Professor of Psychology at Meredith College and Adjunct Assistant Professor of Curriculum and Instruction at North Carolina State University. Since 1975, Dr. Aubrecht has been an active member of Parents for the Advancement of Gifted Education (PAGE) of Wake County. He has served continuously on the PAGE board, and as the Director of PAGE Saturday Morning Program, a model enrichment program for very young gifted children. He has also been active in the North Carolina Association for the Gifted and Talented, as President and currently as a member of the Board of Directors and Chairman for Legislative Action. In 1981, Dr. Aubrecht was appointed to be the Congressional Science Fellow of the American Psychological Association. In this capacity he will serve a one year term in Washington, D.C. as a Special Congressional Aide in the area of child policy.

Wesley Apker is the Executive Director of the Colorado Association of School Executives, having previously served for six years as the Executive Director of the National Association of State Boards of Education. Dr. Apker has had extensive experience in local school districts serving as a teacher of English at the secondary level, a principal of a high school and a superintendent of the Evergreen School District in Vancouver, Washington. While serving as Assistant to the Superintendent of Public Instruction for Washington, Dr. Apker developed legislation, represented the state superintendent to the legislature, and developed state board of education rules and regulations. He has published numerous articles and books on issues in education, as well as several volumes of his poetry. His expertise and achievements in educational leadership have earned him many honors including Outstanding Educator for the State of Washington, Outstanding Personalities of the West and Outstanding Citizens of Colorado.

Theodore Kraver obtained two degrees from the Massachusetts Institute of Technology in astronomical and aeronautical engineering. After ten years of new product development at Garrett Turbine Engine Company in Phoenix, Mr. Kraver formed his own business in 1970, The Burn Treatment Skin Bank, which produced pig-skin dressings for burn victims. After earning an M.B.A. at the University of California at Los Angeles, Mr. Kraver returned to Garrett to manage new venture analysis and strategic planning. His work in gifted education includes: founding President of The Tempe Parents of the Gifted, an organization which influenced the formation of a 1300 student program, and founding Director of the Arizona Association for the Gifted and Talented. He is also the Co-Director of The Gifted Advocacy Information Network (GAIN) which has 5000 networking members focusing on national, state and local advocacy. Mr. Kraver is also a member of the Executive Board of the National Association for Gifted Children and the State Advisory Committee for Gifted Education.

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Patricia O'Connell earned a B.A. degree in Anthropology in 1973 from Beloit College in Wisconsin, and a M.Ed. degree in 1976 from the George Washington University in Washington, D.C. She was selected to be an Education Policy Fellow in Gifted and Talented education through the Institute for Education Leadership from 1976 to 1977. Patricia is currently the state director of gifted and talented education for the state of Maine. When she began her position there in 1976 there were no formal programs for gifted children in the state. Now over one-third of the districts have programs, there is substantial legislation to support the district programs, and Maine has a model summer program, "The Maine Summer Humanities Program for Gifted and Talented High School Students." Ms. O'Connell also secured a grant from the National Endowment for the Humanities to support a project to enlarge the humanities curriculum for students in very rural high schools. Ms. O'Connell was recently elected Vice-President of the Council of State Directors of Programs for the Gifted.

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